eCPIC

Release 3.1

Version Description Document

March 6, 2006

Prepared by Booz | Allen | Hamilton

in support of the eCPIC SLA

Document Change Record

Version Number	Date	Description
1.0	March 6, 2006	Release 3.1 Initial Document

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1. INTRODUCTION

The Electronic Capital Planning and Investment Control (eCPIC) system is a government-owned, web-based application that is used by Federal Agencies to manage investments and prepare budget data for submission to the Office of Management and Budget (OMB). Operations and maintenance of this application is governed through the eCPIC Service Level Agreement (SLA). Decisions regarding the current functionality and surrounding future enhancements will be implemented per direction from the eCPIC SLA. The 14 Federal Agencies that make up the SLA participate in the eCPIC Change Management Committee (CMC), which meets monthly to share lessons learned, review the status of the project, and prioritize actions associated with the application's operations and maintenance.

1.1 OBJECTIVE

This Version Description Document (VDD) identifies and describes the general release information, and inventory of software released for eCPIC Release 3.1. The intended audience for this document is the membership of the eCPIC SLA. This document is designed to help users understand the software modifications delivered in this release; it includes as Appendix A an inventory of the Change Requests (CRs) addressed in the release. Any existing system requirements or suggestions for enhancement that were not addressed in this release were either not identified as a high priority or have not yet been prioritized by the CMC.

The document is organized as follows:

- **Section 1. Introduction.** Describes the objective of this document, defines the release identification, and provides contact information.
- **Section 2. General Release Information.** Provides information about the release, including those change requests addressed and those outstanding.
- **Section 3. Installation Instructions.** Describes the steps required to install the software.
- **Section 4. Release Notes.** Describes the Change Requests addressed with this release that provide new or changed functionality to the system, or that have additional information that should be further explained beyond what is stated in the Change Request(s).
- **Section 5. Change Requests Addressed.** Lists the Change Requests included in this release. This list will be provided as an appendix to this document.
- **Section 6. Deferred Change Requests.** Lists the Change Requests that have been deferred to an upcoming release. This list is posted on the eCPIC Resource Center weekly.

1.1.1 Identification

Application Name	Electronic Capital Planning and Investment Control
Application Acronym	eCPIC
Version Number	Release v3.1
Release Date	03/06/2006
Installation Date	Install on or after 03/06/2006

1.1.1.1 Contact List

Name	**Title**	**Work Phone**	**E-mail Address**
Help Desk	Help Desk	202-508-6577	ecpic@bah.com
Angela Clague	Project Manager	202-508-6544	clague_angela@bah.com
Ryan Bolchoz	Technical Lead	202-508-6580	bolchoz_ryan@bah.com

2. GENERAL RELEASE INFORMATION

eCPIC Release v3.1 is released to the eCPIC Service Level Agreement (SLA) user community on March 6, 2005. The final release has gone through User Acceptance Testing (UAT) at the Department of Commerce (DOC) and the Department of Housing and Urban Development and approved for release by the UAT participating agencies on March 3, 2006. For an inventory of the issues addressed in this release, a list of the Change Requests addressed in this release is attached in excel format as Appendix A.

2.1 OUTSTANDING ITEMS

2.1.1 300 XML Import

When importing the 300 XML, the UPI is parsed in order to designate the mission area (among other pieces of information) for that particular investment. Upon upload, if there are multiple mission areas with the same mission area number, the upload will associate the investment with the first active mission area and its corresponding mission area number. If there are no active mission areas with that particular mission area number in eCPIC, then the first inactive mission area will be associated. If there are no matching mission area numbers, an error message will be displayed.

2.1.2 Summary of Spending and Funding Source Saving

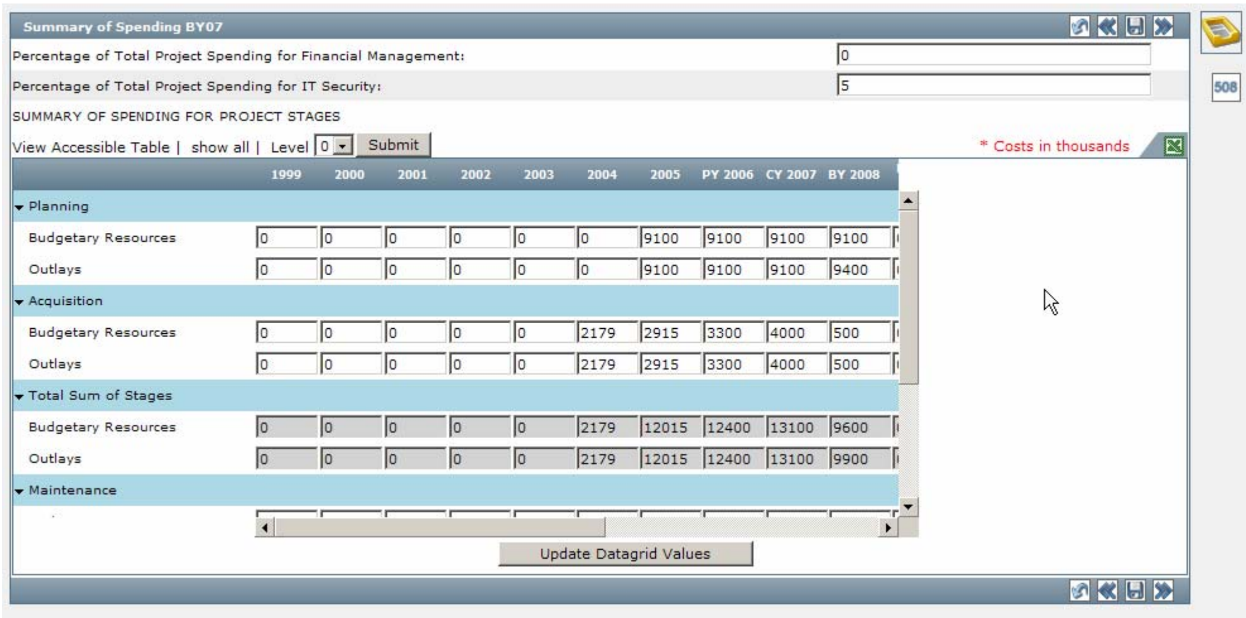
CR 4559 requested that users save the Summary of Spending (SOS) and Funding Source table values on the investment page with the save and save and next arrow buttons. This CR was discussed at the CMC Meeting on February 8, 2006 and the decision was made to remove the update buttons from the table and the SLA team began moving forward with this CR. However, when implementing this CR, several adverse effects of the change were recognized and the CR was excluded from Release v3.1. The undesired consequences included loss of error handling functionality and loss of validation of non-numeric data. Due to the high risk associated with making significant changes to maintain the functionality described above, the CR was deferred and the save functionality will remain as it is from the previous releases of the application.

2.1.3 Display of Sub-Categories in the Enhanced Summary of Spending Table

Release v3.1 of eCPIC includes the ability to tailor numerous levels of categories into the Summary of Spending (SOS) table. Please be advised that the user-interface of the SOS is adversely affected if there are more than 10 levels of SOS categories tailored into the table. At level 11, the indentation of the given row names will be so far to the right that the category labels will be hidden by the data entry cells of the table. At first, the row names begin to get cut off, but eventually neither the row name nor the expanding/collapsing arrow can be seen.

2.1.4 User Interface of SOS when Other Investment Pane Toggled On

When the Resource Library or Scoring pane is toggled on from within the Summary of Spending sub-section of an investment, the UI for that sub-section is affected adversely. Due to the table used for locking headers, white space is visible to the right of the table.



2.1.5 Page Numbers on Word Export

CR 5860 requests that automated page numbering be added to investments exported to Word. Currently there is no technical solution for this request. The method for accessing Microsoft Office API's involves using COM automation at an unattended server, which requires additional software to be installed on the web server, proposes a security risk, and has a documented issue by Microsoft with causing the application server to lock and hang. The CR was closed in January 2005 and verified by the CMC subcommittee consisting of representatives from GSA, State, Commerce, HUD, and Interior. The CR currently has a status of verified documented.

It is recommended that eCPIC System Administrators encourage users to be aware of this item and to manually insert page numbers in Word after export. This can be accomplished by going to **Insert -> Page Numbers** from the main menu in Word.

2.1.6 Variable Budget Year in Reporting and Charting

With eCPIC version 3.1, the ability to vary the Budget Year for reporting purposes has been added as a system wide application configuration setting. Based upon this setting, the Budget Year labels for the Summary of Spending Table and the Funding Source table will be displayed as either a Pre-submission (Budget Year is displayed as the same year of the template) or a Post-Submission (Budget Year is displayed as one year greater than the current year's template). The Exhibit 53 functionality has also been extended to provide users with the capability of generating a report on all of the out years collected with eCPIC. Currently, the reporting and portfolio charting sections of the application have not been modified to take this setting into account. When running reports and charts, the Budget Year will be run as the Budget Year for the template the investment was created in regardless of which admin setting has been selected for Budget Year Reporting.

2.1.7 Rich text control issues

With eCPIC version 3.1, a new rich text control has been added to the system to allow users to markup their business case text. There are numerous things that system administrators should take into account:

1. Upon install, all current Text Areas (except the OMB Short Description) will be converted to Rich Text Areas allowing for the markup of business cases. Due to the size limitations of the OMB Short Description field, it will remain as a Text Area and markup will not be allowed for this field

2. If administrators wish to change any Rich Text Areas back to Text Areas, and thus not allow text markup, it is advisable that this be done directly after installation. Once users are allowed access to the system, they will begin to markup these fields and the transition between markup text to plain text will be difficult.

3. The new rich text control comes with a separate spell checker than the eCPIC page spell checker. This allows users to check spelling on individual rich text fields rather than the full page. Due to the fact that this is available to users, the full page spell checker will no longer check text for individual rich text areas.

4. The new rich text control also contains Magnify functionality. This allows users to zoom in and out on their text from within the textbox. As such, the eCPIC page zoom is not implemented for rich text areas although it is still accessible for Text Areas and Textboxes.

5. When inserting a table into the Rich Text Area box, if the width is set to 100%, the Text Area will scroll horizontally. In order to avoid this, set the width percentage to 95% when creating tables.

6. Pasting Tables from Excel into the Rich Text area may cause issues when printing the eCPIC Word export. A recommended approach for copying and pasting Excel tables into Rich Text areas and some of the items to keep in mind when printing word documents with tables in Rich Text areas is provided in Section 4.1.3

3. INSTALLATION INSTRUCTIONS

3.1 ASSUMPTIONS AND REQUIREMENTS

The following installation instructions assume the following requirements have been met:

Web Site:

- The eCPIC database has **one user with the login, "Admin."** (This is not case sensitive.)
- The Administrator installing the upgrade has **access to the eCPIC web server**.
- The Administrator installing the upgrade has **access to the Add/Remove Programs utility in the Control Panel.**
- The Administrator installing the upgrade has a Windows user account with "**Full Control" access to the eCPIC root directory.**
- The Administrator installing the upgrade has **access to IIS** so that the web site can be stopped while it is upgraded.

Database:

- The eCPIC database, that is being upgraded, is currently up to date with eCPIC release version 3.0. If not, the database must be upgraded to v3.0 before proceeding.
- The Administrator installing the upgrade has the **SA (SQL) or Schema Owner (ORA) access to the eCPIC Database**.
- The Administrator installing the upgrade on the SQL platform must have the **server name**, **database name**, **database login and password for the SA account,** and the **SQL user name** (application-specific user name).
- The Administrator installing the upgrade on the ORA platform must have the **database name**, **database login and password** (Schema Owner).

3.2 DOWNLOAD UPGRADE PACKAGE

eCPIC Release 3.1 is delivered in the form of a self-extracting executable; a small program that will unzip and install the new version.

The release of eCPIC version 3.1 will be distributed to participating agencies via the eCPIC Resource Center (ERC).

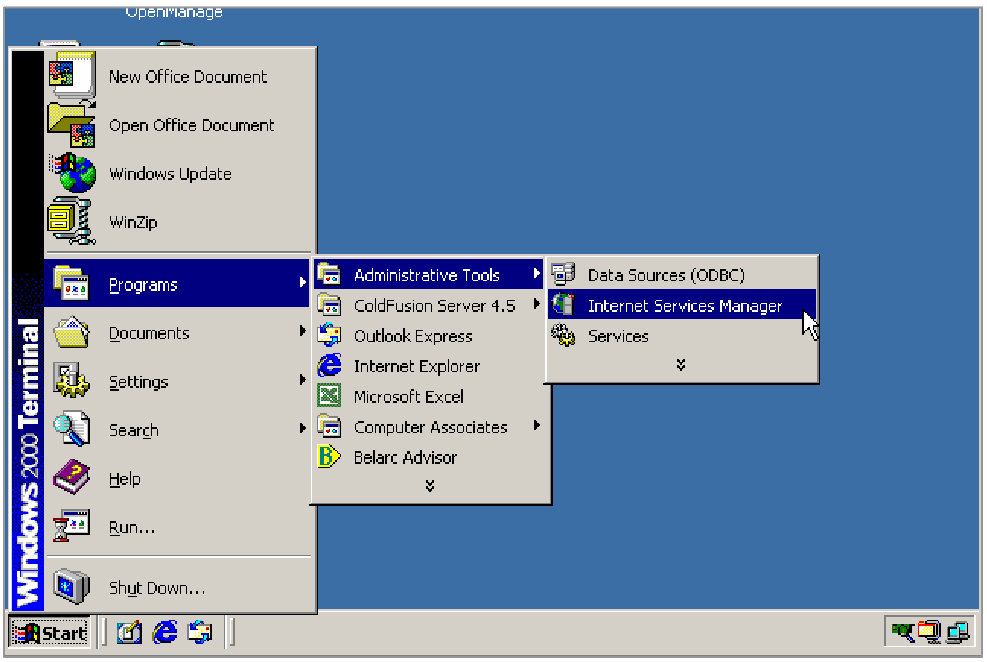
1. Navigate to the ERC located at http://www.ecpic.gov/
2. Click on the Members tab.
3. Log into the Members only portion of the site.
4. Click on the eCPIC Release Link (the first one).

5. Download the eCPIC Release 3.1 Upgrade and save it to your hard disk (take note of where you save the file, because you will need to access it again when you install the upgrade.). The file is named "eCPIC_3.1.msi".

6. If you are downloading this file on a machine other than the web server, you will need to save it to a directory that the web server can access, **or** save it to portable media (disk or CD) to transport and copy on to the web server.

3.3 STOP THE WEB SITE

In order to stop the web site, you must be able to access IIS (Internet Information Services), and execute the following steps.



1. Click **Start** > **Programs** > **Administrative Tools** > **Internet Services Manager**.

2. In IIS, click once to highlight the eCPIC web site.

3. Right click and select **Stop** from the menu items available.

4. This will stop the web site. You can leave IIS open while you upgrade the site, so that you can access it quickly to restart the web site once the upgrade is complete.

3.4 CREATE AN ARCHIVE OF YOUR 3.0 WEB APPLICATION FILES

It is recommended that you archive the version 3.0 application files before beginning the upgrade. On the web server, create a new directory called "**eCPIC_Version_3.0_Archive**." Copy all of the eCPIC application files from your eCPIC root directory into this new folder. This will allow you to revert to version 3.0, if the need should arise.

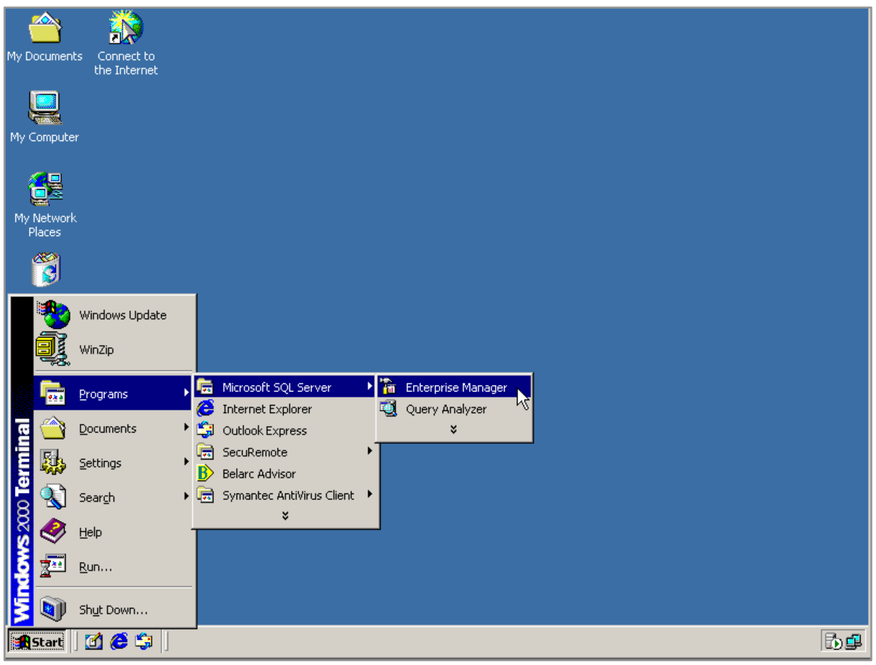
3.5 CREATE A BACKUP OF YOUR CURRENT DATABASE

This is an important step because this is how you make certain that your testing environment matches your production environment exactly.

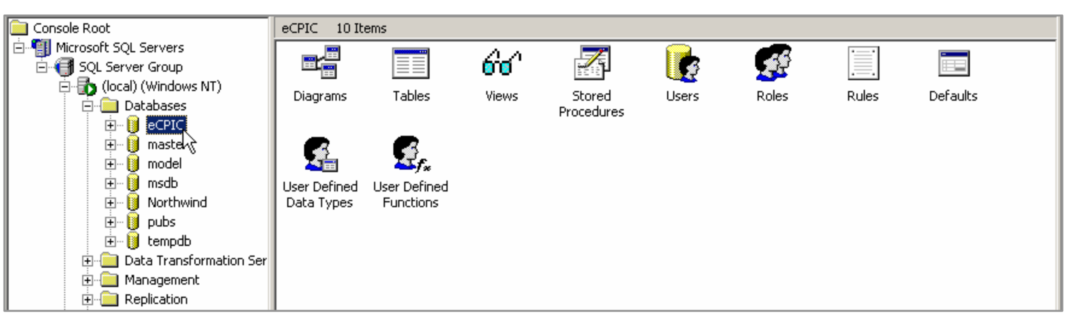
It is very important that you ensure the integrity of your database backup by saving it to a location where it will not be overwritten by the backup routine your agency has in place. You must either save the backup to a location where you know it will safe, or modify your backup routine so that it will not overwrite the backup.

3.5.1 CREATE A BACKUP - SQL

1. On a server with Microsoft SQL Server Enterprise Manager, access the eCPIC database by clicking **Start** > **Programs** > **Microsoft SQL Server** > **Enterprise Manager**.

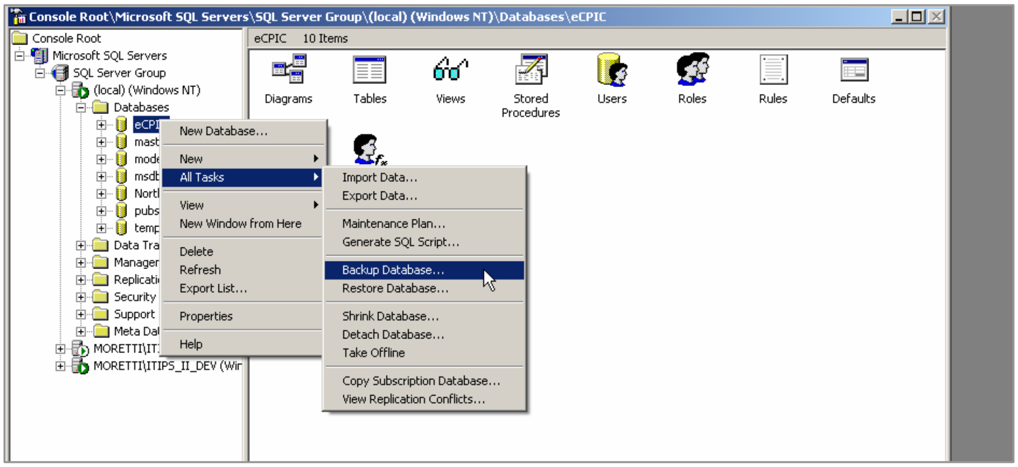


2. In the Databases folder, highlight the eCPIC database.



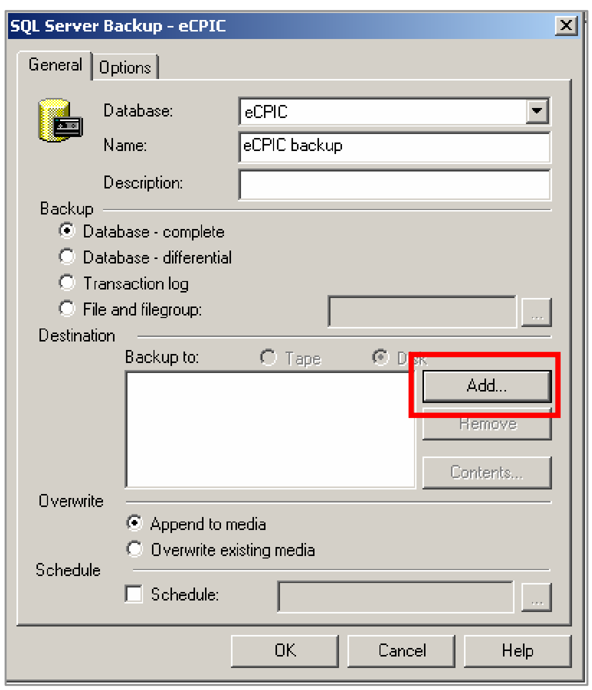
3. Right click and select **All Tasks**.

4. Select **Backup Database**.



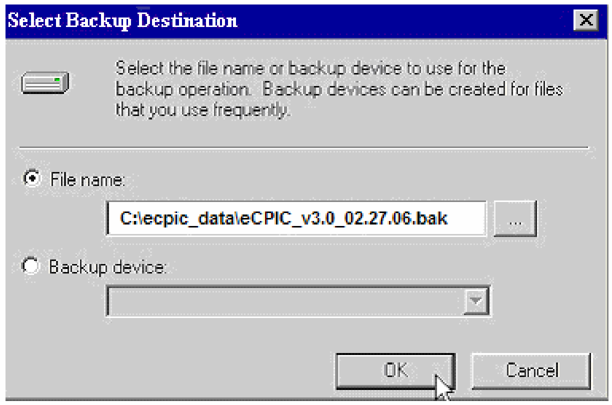
5. In the next screen, accept the **default settings**.

6. From the SQL Server Backup window (General tab), click the **Add** button to indicate where you want to save the database backup file.



7. Use the  button to browse to the destination directory.

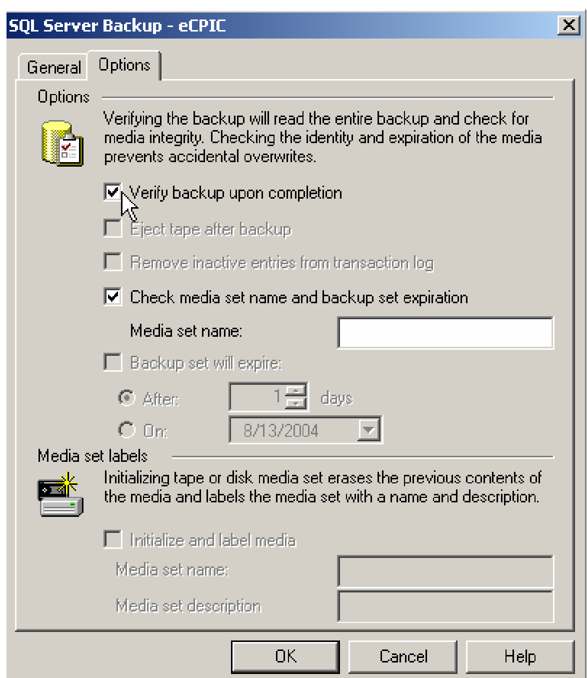
8. Type in the file name you wish to use for the backup. You are encouraged to include the date and eCPIC version in the name of your backup file.



9. Click **OK**. The screen will refresh back to the SQL Server Backup window.

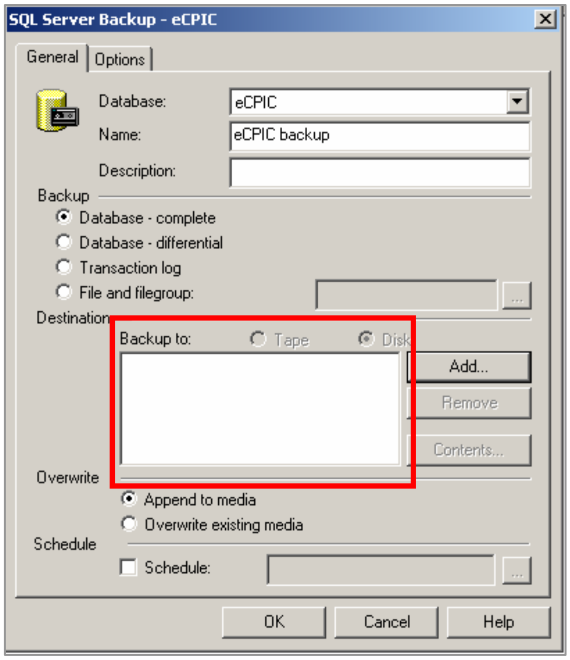
10. Click the **Options** tab.

11. Check the **Verify backup upon completion** checkbox.



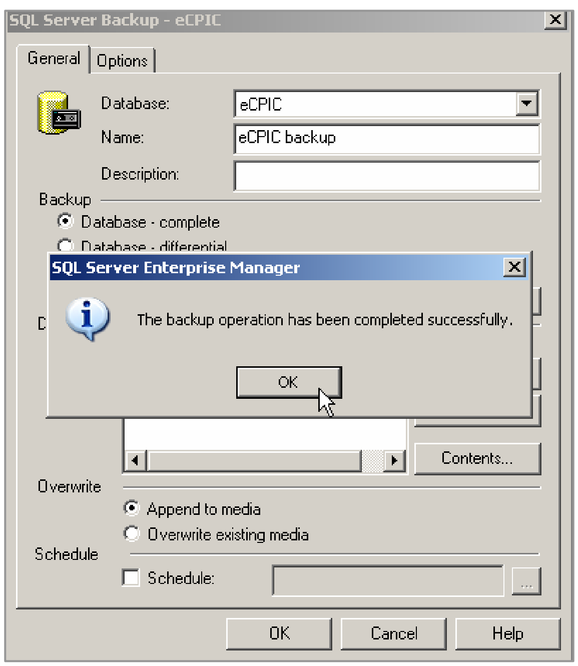
12. Click **OK** to go back to the General tab.

13. Verify the location and filename in the **Backup to:** window.



14. Click **OK** to begin executing the backup.

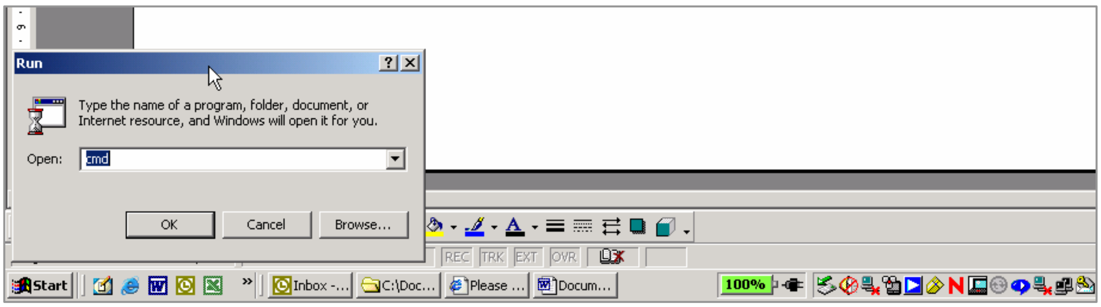
You will receive a message telling you when the backup operation has been completed successfully.



3.5.2 CREATE A BACKUP - ORACLE

Note: You must create your Oracle database backup as the Schema Owner. *Do not* create the backup as "System," as you will not be able to restore your database using a backup created that way.

1. From a computer that has the Oracle Import/Export Utility installed, click **Start** >**Run**.



2. In the Run dialog box, enter **cmd** in the **Open:** field to launch the command prompt.
3. If the command prompt is not at the C: drive, change the directory by entering **cd C:**

Note: If you are using a directory other than C for storing your backup and log files, replace "C:\" with the appropriate directory (i.e., cd d:\).

4. From the command prompt, type the following command all one line (*do not insert line breaks*):

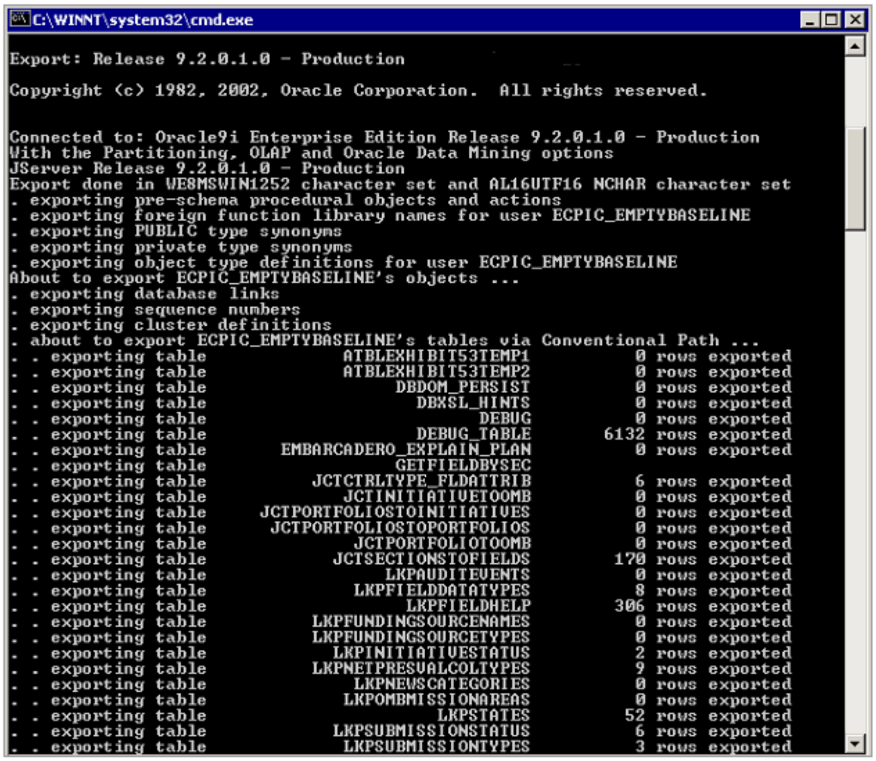
   exp userid={schema owner}/{password}@{datasource}
   file=ecpic_v3_0_{yyyymmdd}.dmp owner={schema owner}
   log=ecpic_v3_0_{yyyymmdd}.log

   - Replace **{schema owner}** with the user name for the schema owner.
   - Replace **{datasource}** with the eCPIC datasource name specified in the tnsnames.ora file. This would also be the name used in the application's web.config file.
   - Replace **{password}** with the password used to connect to the datasource. This can also be found in your web.config file.
   - Replace **{yyyymmdd}** with today's date.

The following is an example of this command where the userid is "**ECPIC_EmptyBaseline**," the password is "**ecpicpass**," and the datasource is "**ecpic_datasource**." The .dmp and .log files are explicitly exported to the **d:/ecpicroot** directory.

> **exp ECPIC_EmptyBaseline/ecpicpass@ecpic_datasource**
> **file=d:\ecpicroot\ecpic_v3_0_200600306.dmp**
> **log=d:\ecpicroot\ecpic_v3_0_20060306.log owner=ECPIC_EmptyBaseline**

5. Hit **Enter** to begin the database export. The following image shows you what the cmd window looks like while the export is taking place.



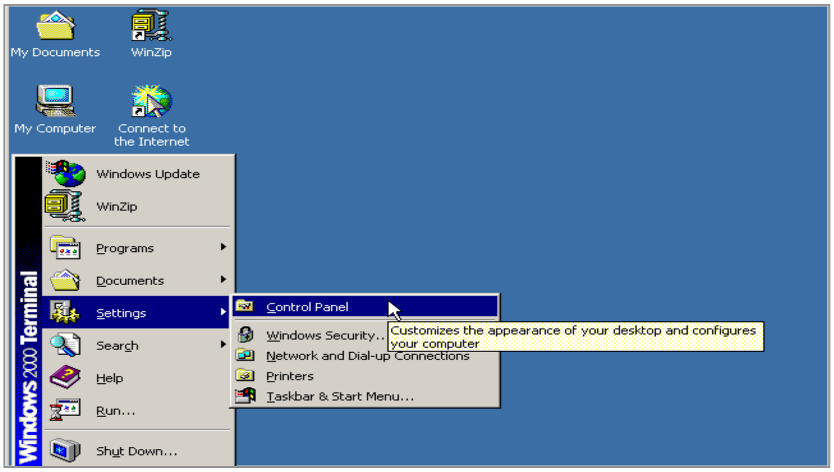
6. When this export successfully completes, locate the file in the c:/ (or other specified) directory. **In the directory you specified, you should see both a .dmp file and .log file that include today's date.**

You have now successfully backed up your Oracle eCPIC database.

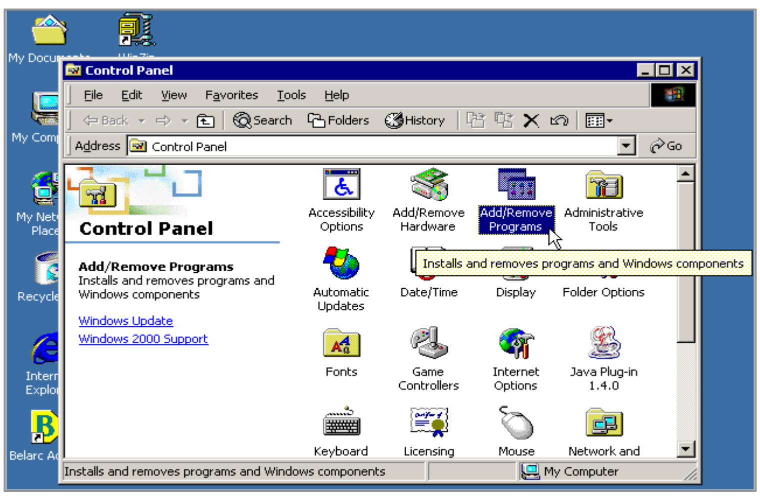
After you complete UAT, this is where you will find the .dmp file you will use to restore the database to its version 3.0 baseline. It may be wise to attempt a restore using this backup right after you create it so that you can verify your ability to do this later.

3.6 UNINSTALL THE CURRENT VERSION OF ECPIC

1. From the Start menu on the web server, select **Settings** > **Control Panel**.



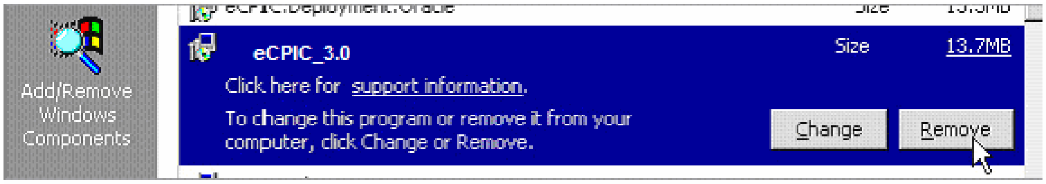
2. Double click on the **Add/Remove Programs** icon.



3. Scroll through the installed applications to find eCPIC. You should see only one version (2.3) of eCPIC installed.

4. Click once to highlight the eCPIC application.

5. Click the **Remove** button.



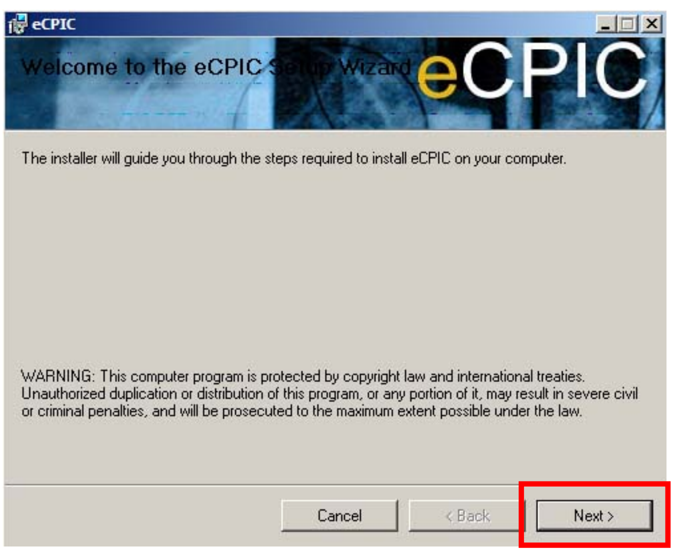
6. Confirm that you want to remove the program. You must do this before installing the new version.

Note: If requested to restart the server after uninstalling the previous version, please do so.

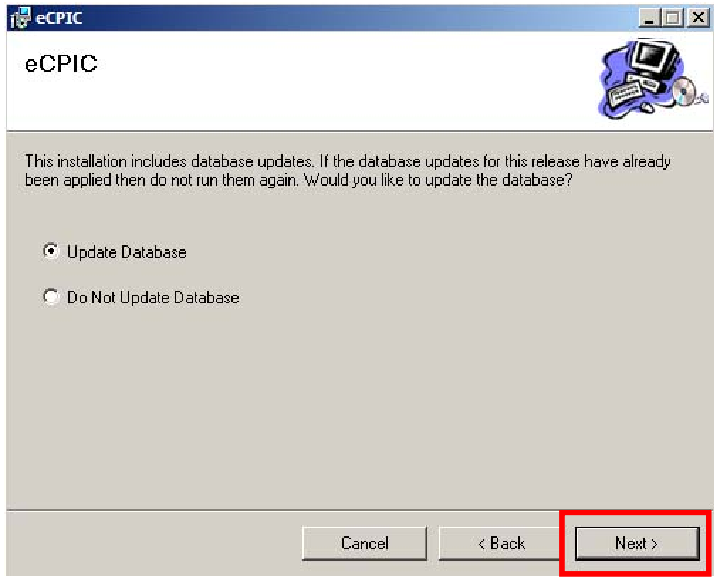
3.7 INSTALL UPGRADE

These instructions assume that you have already archived your application files from the previous version and created a database backup.

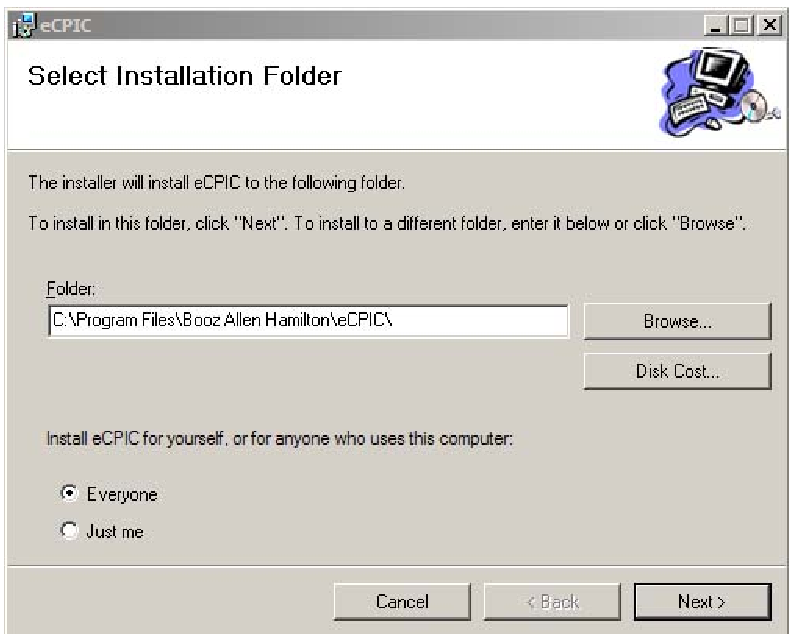
1. Open the **Windows File Manager** or **Explorer** to see the files and folders on your PC's hard disk. You can find its icon in the 'Start' menu, under 'Programs'.
2. Locate the **eCPIC** install file that you downloaded and saved to your hard disk. It is named "**eCPIC_3.1.msi**".
3. To begin the installation, double click on the install file. The installation program will be started automatically. The installation wizard will begin and you will be prompted with the following screen to continue. To continue, click **Next**.



4. At the next screen you will be asked whether or not you would like to update the database to the latest version. **This should be done only once.** To continue, click **Next**.



5. In the following screen, select where you would like to place the application files.

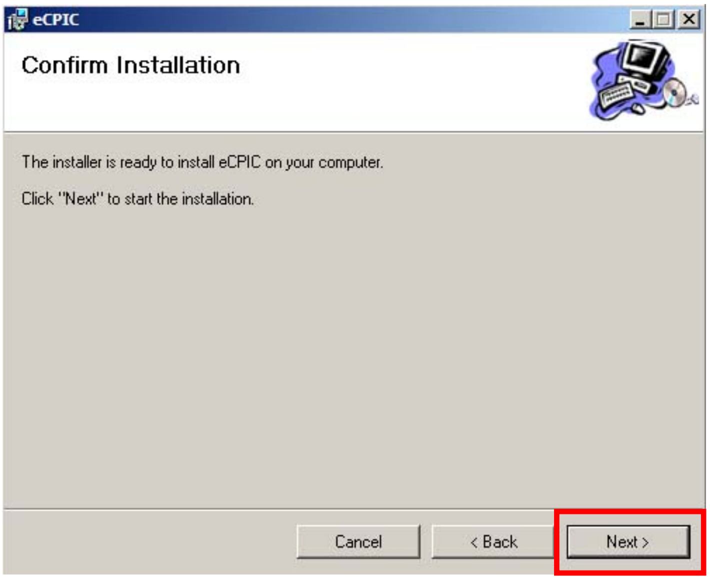


Note: This folder should be the eCPIC root directory that was previously established.

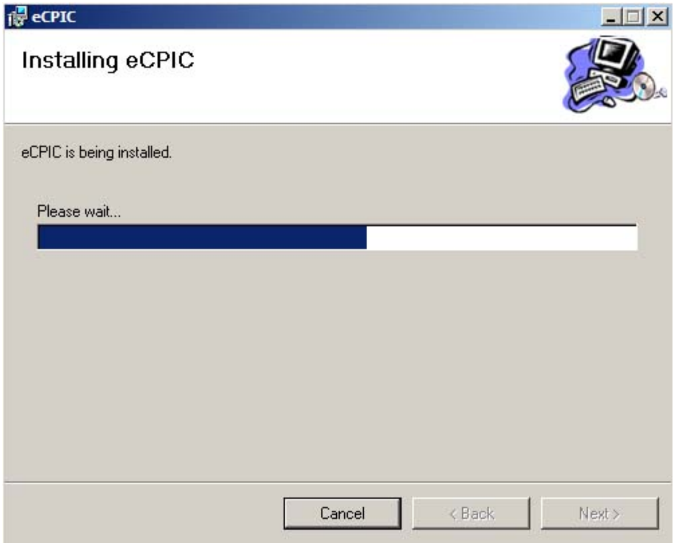
6. Determine the place on your hard disk where eCPIC is currently installed. This needs to be the previously established root directory.

7. Make sure that the **Everyone** radio button is selected in this screen. Click **Next**.

8. Select **Next** on the "Installation Confirmation" screen and the installer will begin copying the application files to the location you specified.



Note: You will need to wait while the files are installed on the server.

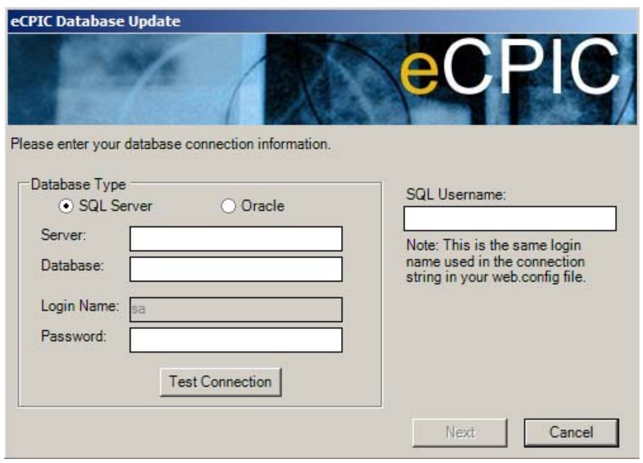


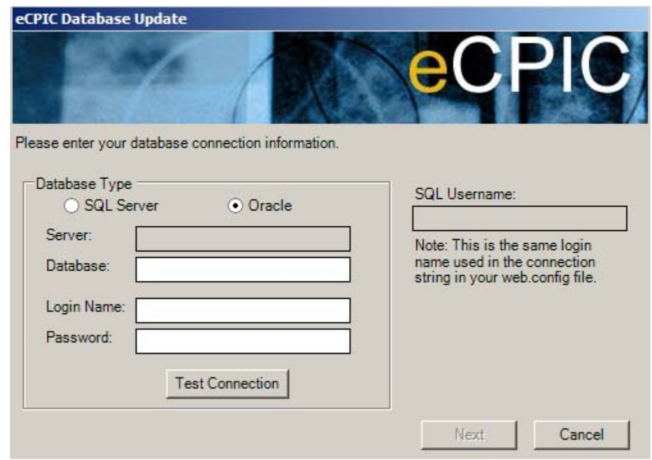
If you selected to update the database, the following screen will be displayed. You will be required to enter the connection information for the database.

Note the difference in the screen shots for MS SQL Server and Oracle users.

SQL agencies need to use the sa password to execute the database portion of the upgrade. The sa login has been hard coded into the release package.

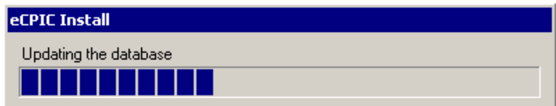
9. After you have entered all your database connection information click the **Test Connection** button.



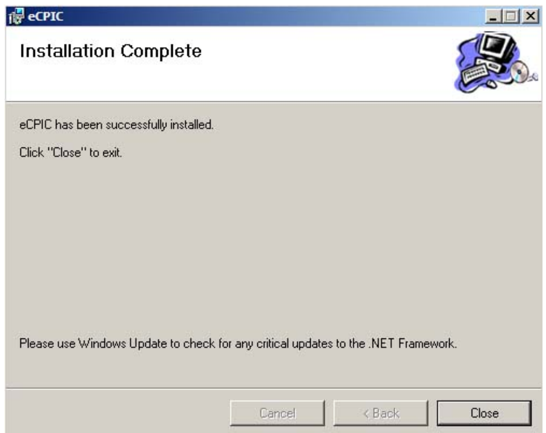


If the information you have provided is correct and there are no problems connecting to the database, the connection will be confirmed and the Next button will become available.

10. Click **Next** and the installation package will proceed to update the database. The database update may take a few minutes, so please be patient.



Once the upgrade is complete and the database modifications have been made, the installation package will output an error log documenting any problems that may have occurred with the database update. **This file will be located on your desktop and will be named "eCPIC_ERROR_LOG.txt."** Your installation is not complete until you have reviewed this error log. When no problems occur, the file will be empty.



Note: When the installation is complete, please send this file via email to the eCPIC Help Desk at ecpic@bah.com

If you wish to change the default eCPIC image used on the main page, use the following procedure.

- Go to image directory and change to correct agency logo. The directory is located at **(./Web/Images/Agency)**. There you will find agency logos for each SLA member.
- In order to use your agency logo for the homepage, copy the correct image file to the Images directory **(./Web/Images)**.
- Once it has been copied there, rename file "**agencylogo.gif**". This file will then be used for the image displayed on the home page.

Your browser cache may need to be cleared in order for the change to take affect. If your agency wishes to create its own logo, an image (size: width = 270 pixels, height = 80 pixels) can be placed into the image folder under the same file name (agencylogo.gif).

3.8 WEB.CONFIG MODIFICATIONS

Rich text enhancements and the addition of new spell checking functionality require the following changes to be made to the application's **"web.config"** file. If you have any questions on the following eCPIC configuration changes, please do not hesitate to contact the eCPIC Help Desk.

> **Note:** The XML displayed in this document wraps for spacing and readability reasons only. The XML inside a node in the web.config should not wrap. An XML node in the web.config that is wrapped will cause the application to not function correctly.

1. Update the infragistics.web node, following the "configSections" node, with the following line in the "web.config" file (Note: this node will already exist in the XML and needs to be updated. A new node should not be created, but the current node modified to reflect the text below):

```
<configuration>

      <configSections>
            <section name="infragistics.web" type="System.Configuration.SingleTagSectionHandler,System,
                  Version=1.0.3300.0, Culture=neutral, PublicKeyToken=b77a5c561934e089"/>
      </configSections>

      <infragistics.web imageDirectory="/images/Infragistics" javaScriptDirectory="/scripts" cssDirectory="/styles"
                  formsDirectory="/forms"/>

</configuration>
```

> **Note:** If your application is running on a virtual server or has problems loading the images and scripts for the rich text areas, the references to the above directories may need to be preceded by a '~'. (Ex: imageDirectory="~/images/Infragistics").

> **Note:** If the application does not start up after the install, please check the web.config for inconsistencies with these changes. Please pay special attention double quotes and make sure that XML nodes do not improperly wrap.

2. In the “appSettings” node of the XML file the following keys need to be appended to the preexisting keys in order for the application to know whether your site is running on Secure Socket Layer (SSL) or not. If your site implements SSL, the value property should be set to *True*. If your site does not implement SSL, then the value should be set to *False*. The key below is an example of the node for an agency that does not run SSL.

```
<configuration>

      <appSettings>
            <add key="SMTPSERVER" value="SMTPServerName" />

            <add key="ISSECURECONNECTION" value="False"/>
      </appSettings>

</configuration>
```

3.9 SET DIRECTORY PERMISSIONS

The following folders require specific security settings so that the eCPIC application can perform certain file system tasks (all directories are relative to the eCPIC folder in which the application was installed). The list only includes those folders which need updated or new permissions modifications.

- . / Web / ResourceLibraryFiles /
  - The ASP.NET Machine Account must have READ, WRITE, and DELETE Access
  - The Internet Guest Account must have READ Access
- . / DeletedResources /
  - The ASP.NET Machine Account must have READ and WRITE Access
- . / Web / MSProject / (and all subfolders – propagate permissions)
  - The ASP.NET Machine Account must have READ, WRITE, and DELETE Access
  - The Internet Guest Account must have READ Access
- . / ErrorLog
  - The ASPNET Machine Account must have WRITE Access
- . / Web / ChartImages /
  - The ASPNET Machine Account must have WRITE Access

3.10 RESTART WEB SITE

1. Using the steps outlined above for stopping the web site, open IIS and click once to highlight the eCPIC web site.
2. Right click and select **Start** from the menu items available.

3.11 VERIFY WEB SITE

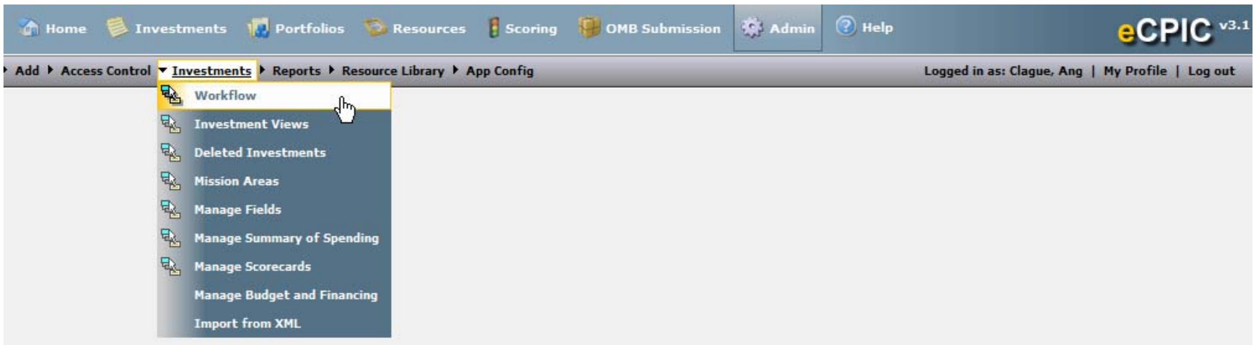
Once the upgrade has been executed and the web site has been restarted, browse to the eCPIC web site and verify that you can access it without a problem.

3.12 ADD INVESTMENT DEPENDENCY TABLE TO INVESTMENT WORKFLOW

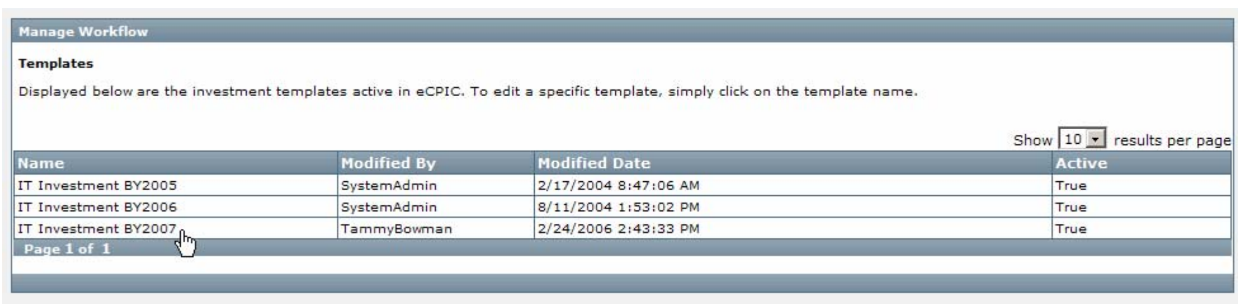
Release v3.1 includes a new non-OMB datagrid – the investment dependency table, which captures relationships between investments. This table is an available field with v3.1, but is not added to the investment workflow on upgrade to the new version. Thus your agency's System Administrator needs to add the table to the desired template, process, section, and sub-section(s). The following steps describe how to add the investment dependency to a new subsection in the 'Initiative Definition" of the "Exhibit 300" process in the 'IT Investment BY2007' template. The field can be added to any sub-section within your workflow.

1. Navigate to the **Admin** module.

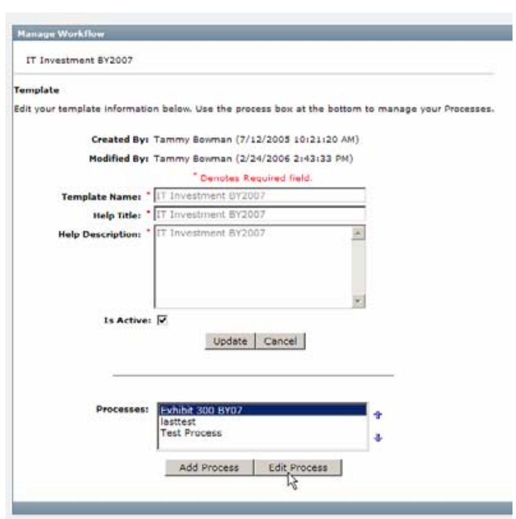
2. Go to **Investments → Workflow** menu.



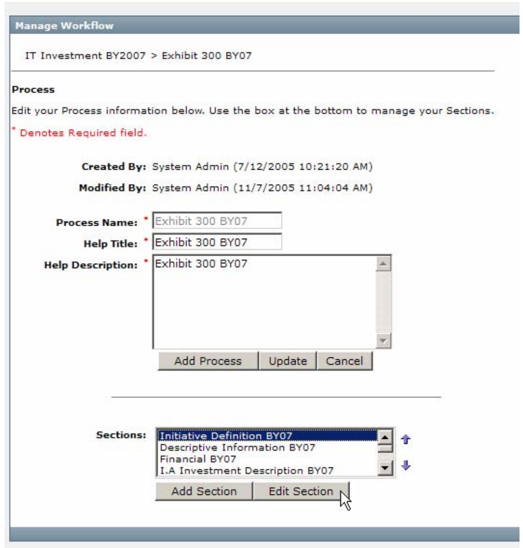
3. Click on the link for the **IT Investment BY2007** template



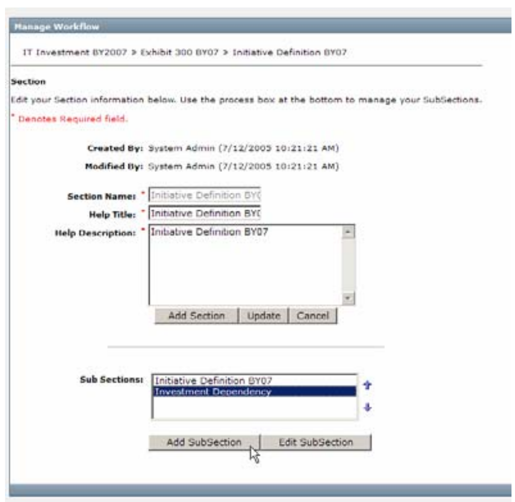
4. Select **Exhibit 300 BY07** in the Processes Box at the bottom of the screen and Click on the **Edit Process** button



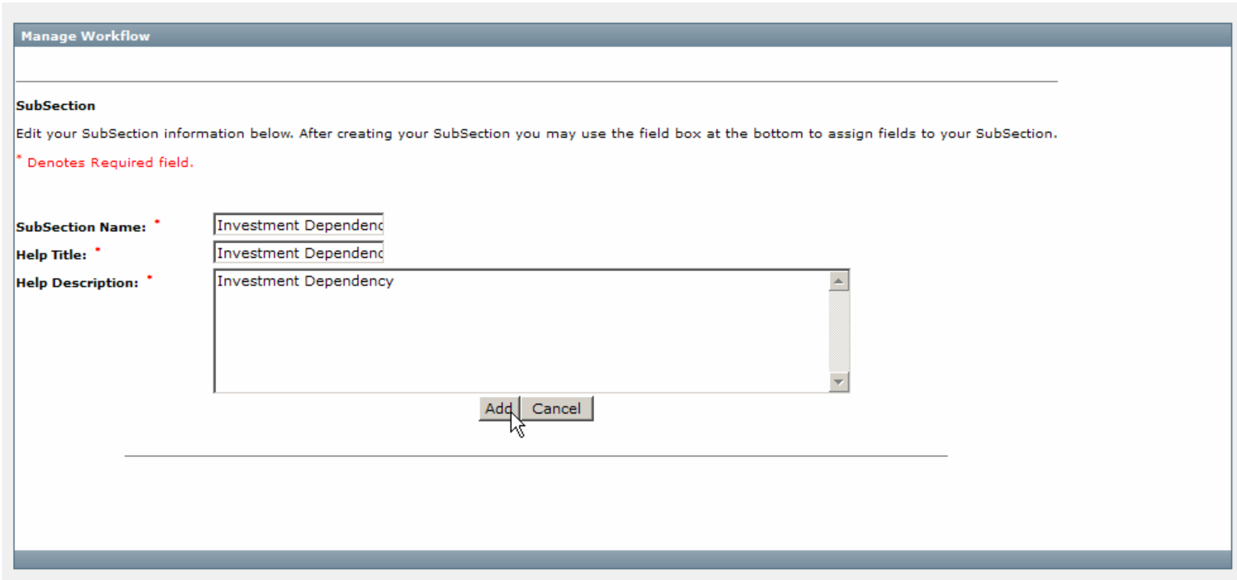
5. Select the **Initiative Definition BY07** in the Sections Box at the bottom of the screen and Click on the **Edit Section** button



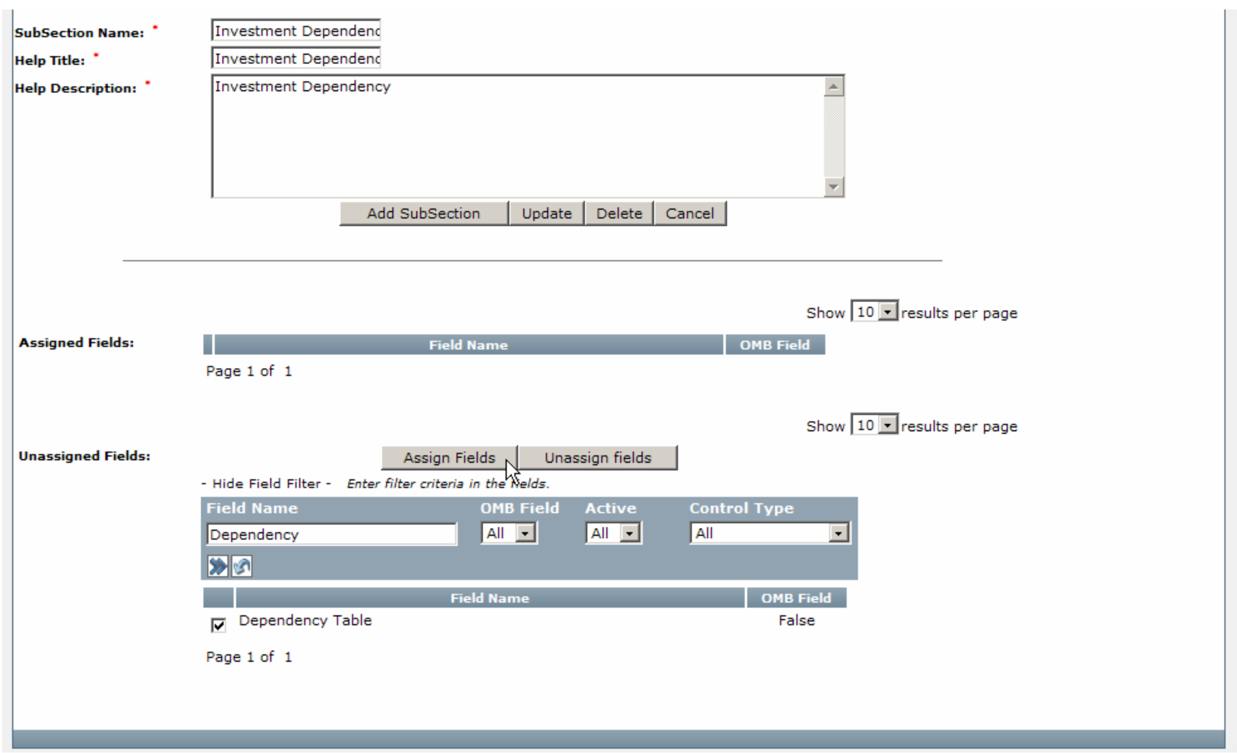
6. Click on the **Add SubSection** button



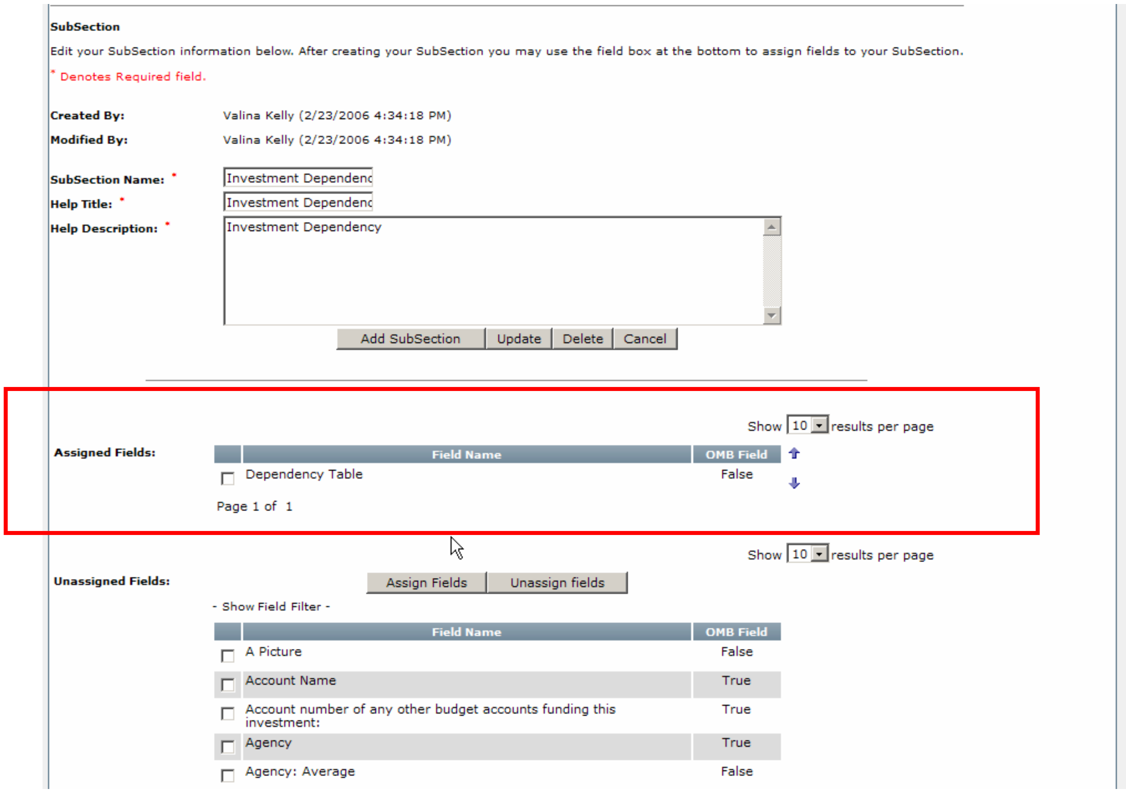
7. Fill out the SubSection Name, Help Title, and Help Description with ‘Investment Dependency’ and Click the **Add** button.



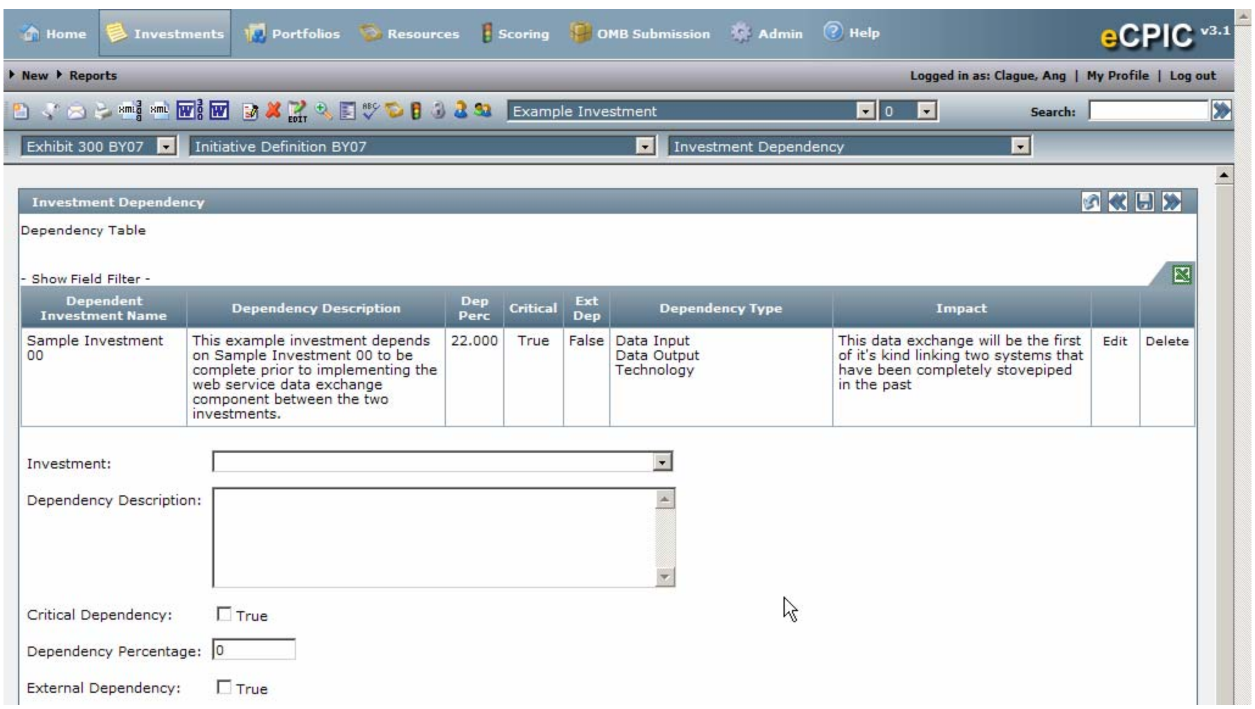
8. Locate the 'Dependency Table' using the field filter, Check the checkbox to the left of the field, and Click the **Assign Fields** button



The Dependency Table will appear in the **Assigned Fields** section of the screen.



9. Navigate to the Admin module, Select any investment in the **IT Investment 2007** template and navigate to the Initiative Definition section and Investment Dependency subsection. The Investment Dependency table will appear as the only field on the screen.



4. RELEASE NOTES

4.1 NEW FEATURES

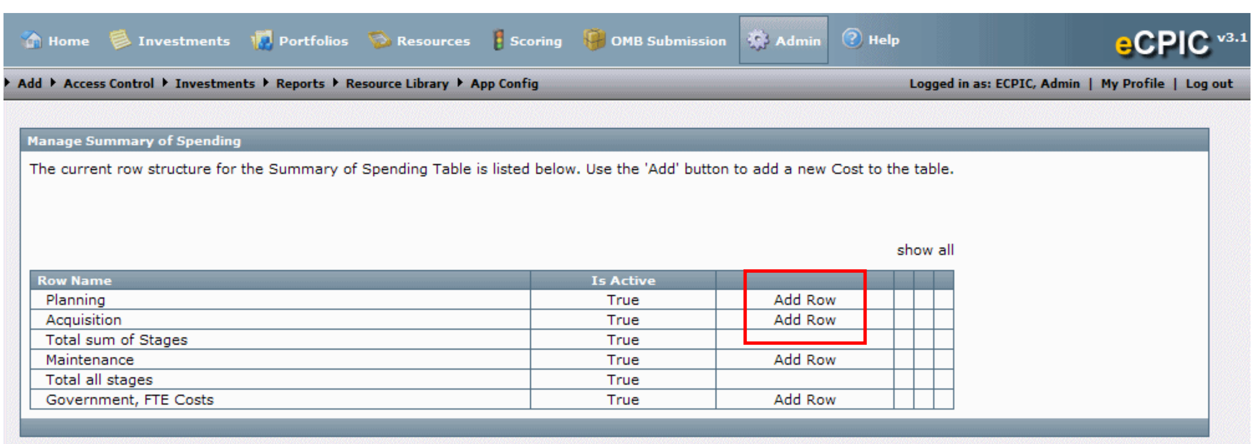
4.1.1 Summary of Spending Enhancements

A focus of Release v3.1 was Summary of Spending (SOS) table enhancements, which included five main pieces of functionality:

1. Allow agency-specific categories to be tailored under the OMB Categories of Planning, Acquisition, Maintenance, and Government FTE Costs
2. Allow for the System Administrator to inactivate/activate SOS rows
3. Allow for the setting of the data input level for the SOS table on an investment by investment basis and account for Consolidated Business Case Investments that have children investments with different levels of data entry on the SOS table.
4. Allow the user to collapse and expand rows in the SOS table
5. Allow the ability to hide outlays rows in the SOS table

System Administrators have the flexibility to add life cycle cost sub-categories to each of the OMB categories as defined per A-11 Guidance. The SOS table can be tailored to numerous levels of categories deep; however, it is recommended that tailoring only be done up to ten levels deep, as the User Interface begins to suffer after that level. The OMB Summary of Spending Categories are considered Level 0 categories. The first sub-category created under each OMB category is considered level 1. Any sub-sub categories created under any of the sub-categories is considered level 2 and so on. For all categories created, Budgetary Resources and Outlays data entry rows will automatically be assigned. Remember however, that if the System Administrator has chosen not to display the Outlays rows, then they will not be viewable by eCPIC users.

In order to customize the SOS table, the System Administrator must access the Manage Summary of Spending table in the Admin Module. The following screen displays, if no child rows have been previously specified:



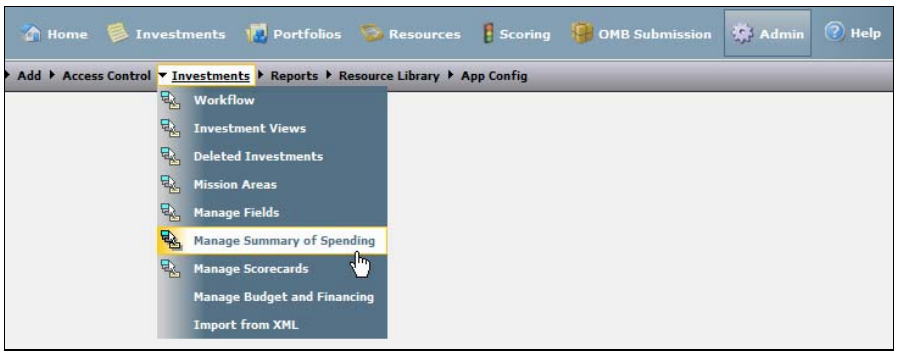
4.1.1.1 *Add Life Cycle Cost Category*

To Add a Life Cycle Cost Category:

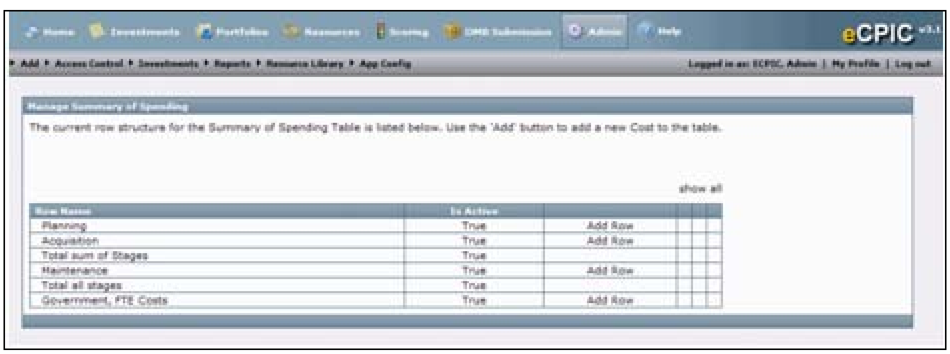
1. Click on the **Admin** module.

2. Mouse over **Investments** to reveal the drop-down menu.

3. Select **Manage Summary of Spending**.

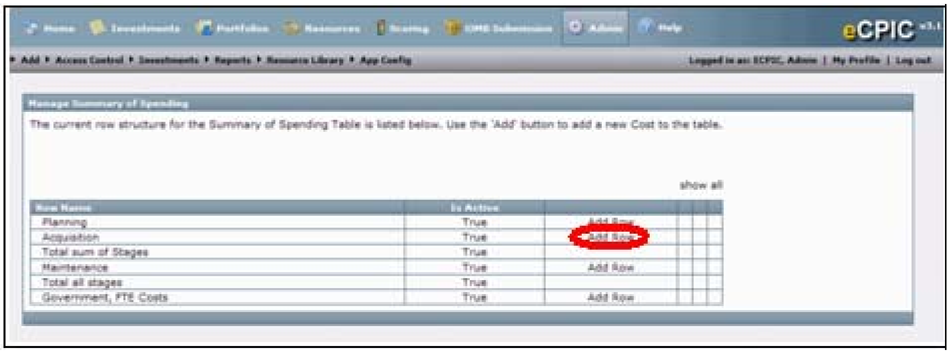


<ins>The Manage Summary of Spending form will appear:</ins>



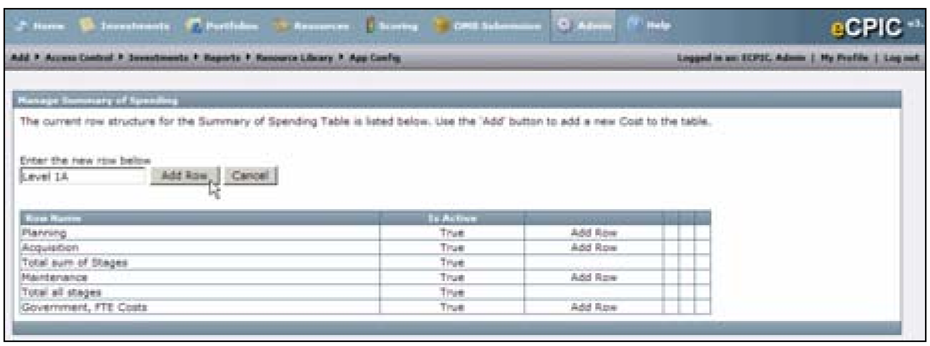
The Manage Summary of Spending form has functionality for expanding and collapsing the display of rows. Any category with a triangle facing to the right has collapsed rows under it and can be extended by clicking on the icon to display additional tailored categories. Any category with a triangle facing down is expanded and can be collapsed by clicking on the icon to hide the additional tailored categories. If there are no triangles next to the name, then no additional categories have been added.

4. Select **Add Row** next to the OMB category for which a tailored category will be added.



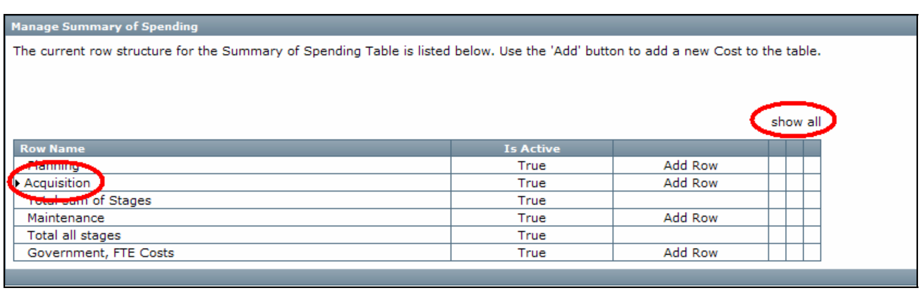
Note: If there is no 'Add Row' next to the category, then this row cannot have any tailored categories added.

5. Enter the new row name in the textbox provided.

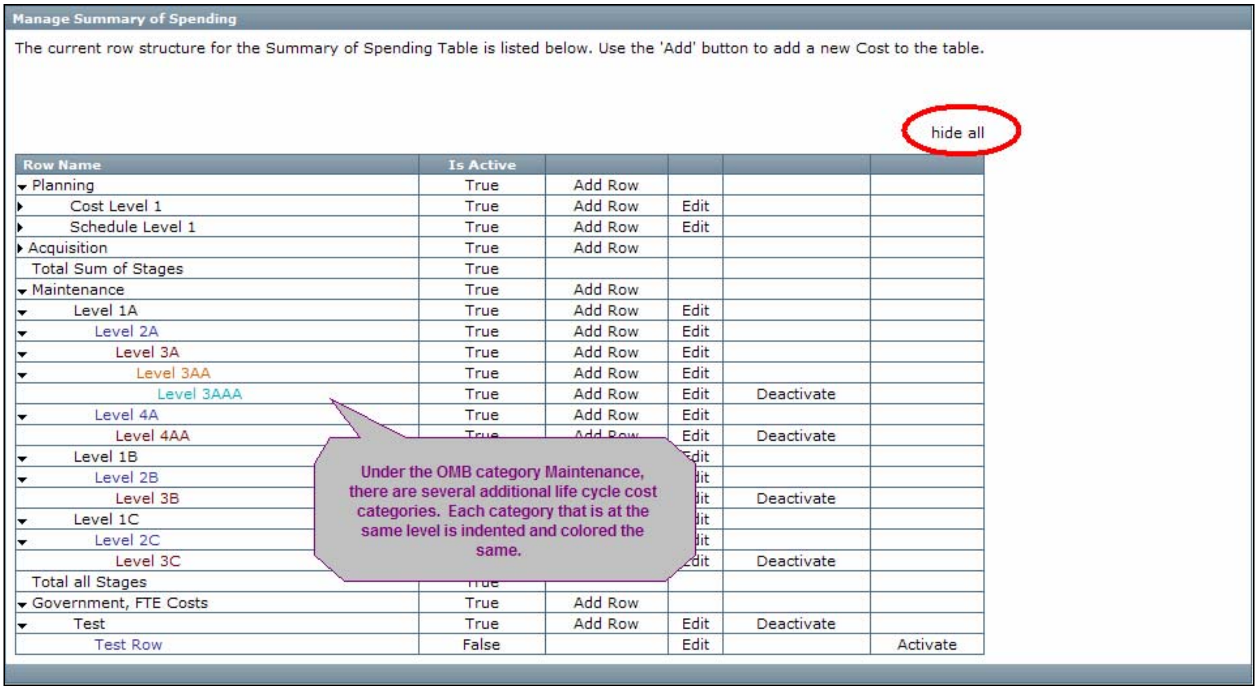


6. Click on the **Add Row** button.

Once a tailored category has been added, the triangle facing to the right will display next to the name of the row that it was created under.



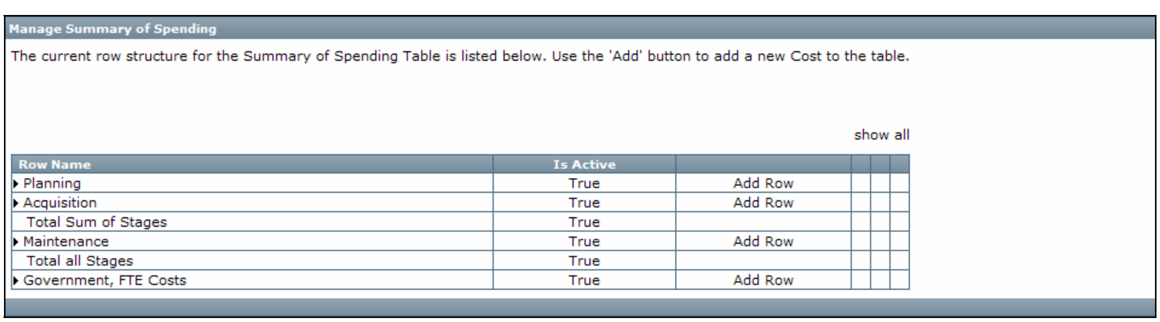
By clicking on the **show all** link located at the top right corner of the table, all the additional category rows will be displayed.



Row Name	Is Active				
Planning	True	Add Row			
Cost Level 1	True	Add Row	Edit		
Schedule Level 1	True	Add Row	Edit		
Acquisition	True	Add Row			
Total Sum of Stages	True				
Maintenance	True	Add Row			
Level 1A	True	Add Row	Edit		
Level 2A	True	Add Row	Edit		
Level 3A	True	Add Row	Edit		
Level 3AA	True	Add Row	Edit		
Level 3AAA	True	Add Row	Edit	Deactivate	
Level 4A	True	Add Row	Edit		
Level 4AA	True	Add Row	Edit	Deactivate	
Level 1B			Edit		
Level 2B			Edit		
Level 3B			Edit	Deactivate	
Level 1C			Edit		
Level 2C			Edit		
Level 3C			Edit	Deactivate	
Total all Stages	True				
Government, FTE Costs	True	Add Row			
Test	True	Add Row	Edit	Deactivate	
Test Row	False		Edit		Activate

Once a category is added to an OMB category, the OMB category becomes a "Parent" row. The first categories created under an OMB category are considered level 1. In the above example, the OMB category **Maintenance** has 3 level 1 rows (*Level 1A, Level 1B and Level 1C*). If rows are created under level 1, then the Level 1 categories become "Parent" rows. This is the case each time an additional row is added to a category. Each level is identified by the same indenting and coloring. When users go to put data into the SOS table, these 'Parent' cells will now be disabled and the cells will be grayed out. The values contained in each cell will represent the *sum* of its sub-categories. The 'Total Sum of Stages' and 'Total All Stages' also represent sum values, cannot be edited, and are shaded gray for visual distinction as a non-entry row. This method applies each time a sub-category is added.

Once in a 'show all' view, the **hide all** link will appear allowing the Admin to hide the entire SOS table, and only display the OMB categories (*Planning, Acquisition, Total Sum of Stages, Maintenance, Total All Stages, and Government FTE Costs*)



Row Name	Is Active				
Planning	True	Add Row			
Acquisition	True	Add Row			
Total Sum of Stages	True				
Maintenance	True	Add Row			
Total all Stages	True				
Government, FTE Costs	True	Add Row			

4.1.1.2 *Edit Life Cycle Cost Category*

When editing a tailored Life Cycle Cost category, only the name of the category can be edited. Once the name has changed, this will be reflected in the SOS table. If an investment has historical data in the category then the data will remain, however, a new category name will be reflected within the SOS table.

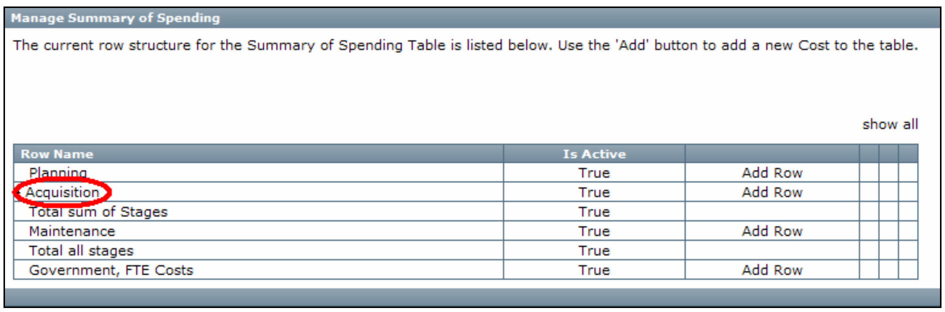
To Edit a Life Cycle Cost Category:

1. Click on the **Admin** module.

2. Mouse over **Investments** to reveal the drop-down menu.

3. Select **Manage Summary of Spending**.

<u>The Manage Summary of Spending form will appear</u>:



Manage Summary of Spending

The current row structure for the Summary of Spending Table is listed below. Use the 'Add' button to add a new Cost to the table.

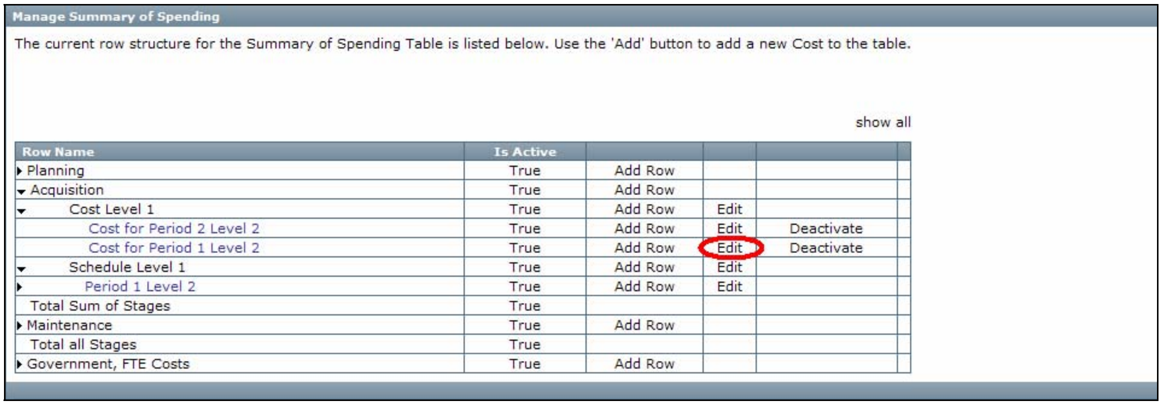
show all

Row Name	Is Active				
Planning	True	Add Row			
Acquisition	True	Add Row			
Total sum of Stages	True				
Maintenance	True	Add Row			
Total all stages	True				
Government, FTE Costs	True	Add Row			

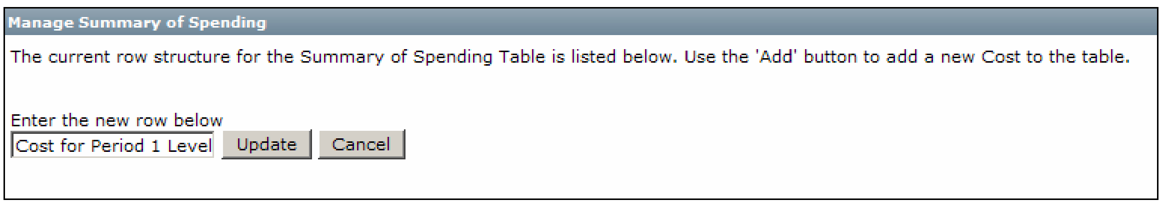
4. Click on the OMB category that contains the row that will be edited.

Note: Depending on the level of the row that will be edited, the Admin will have to keep expanding the rows using the right faced triangle or they can select the 'show all' link.

5. Click on the **Edit** link next to the category that will be edited.



Note: Only tailored rows can be edited. OMB categories cannot be edited.



6. Edit the row name.

7. Click the **Update** button.

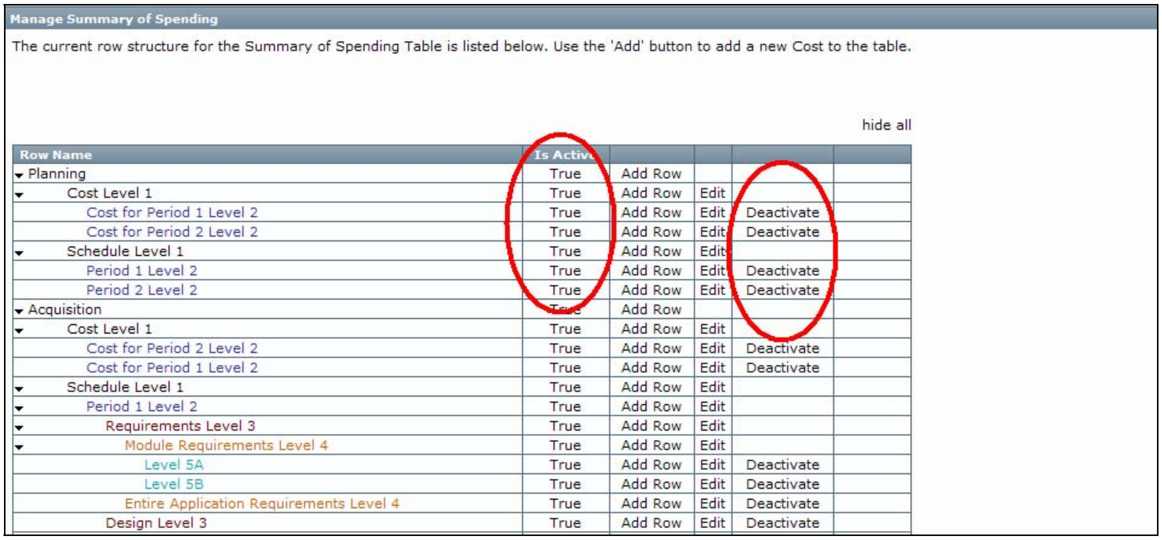
4.1.1.3 Deactivate/Activate Life Cycle Cost Category

Once a tailored Life Cycle Cost Category has been created, it cannot be deleted. An Admin can deactivate a category as an alternative to deleting it.

4.1.1.3.1 Deactivate Row

By default, the **Deactivate** link will appear next to the category once it has been added.

This means that the row is Active. The **Is Active** column will show as **True**. These columns will be viewable within the SOS for users. Unless, the set level does not allow them to view these rows.


Manage Summary of Spending

The current row structure for the Summary of Spending Table is listed below. Use the 'Add' button to add a new Cost to the table.

hide all

Row Name	Is Active				
Planning	True	Add Row			
Cost Level 1	True	Add Row	Edit		
Cost for Period 1 Level 2	True	Add Row	Edit	Deactivate	
Cost for Period 2 Level 2	True	Add Row	Edit	Deactivate	
Schedule Level 1	True	Add Row	Edit		
Period 1 Level 2	True	Add Row	Edit	Deactivate	
Period 2 Level 2	True	Add Row	Edit	Deactivate	
Acquisition	True	Add Row			
Cost Level 1	True	Add Row	Edit		
Cost for Period 2 Level 2	True	Add Row	Edit	Deactivate	
Cost for Period 1 Level 2	True	Add Row	Edit	Deactivate	
Schedule Level 1	True	Add Row	Edit		
Period 1 Level 2	True	Add Row	Edit		
Requirements Level 3	True	Add Row	Edit		
Module Requirements Level 4	True	Add Row	Edit		
Level 5A	True	Add Row	Edit	Deactivate	
Level 5B	True	Add Row	Edit	Deactivate	
Entire Application Requirements Level 4	True	Add Row	Edit	Deactivate	
Design Level 3	True	Add Row	Edit	Deactivate	

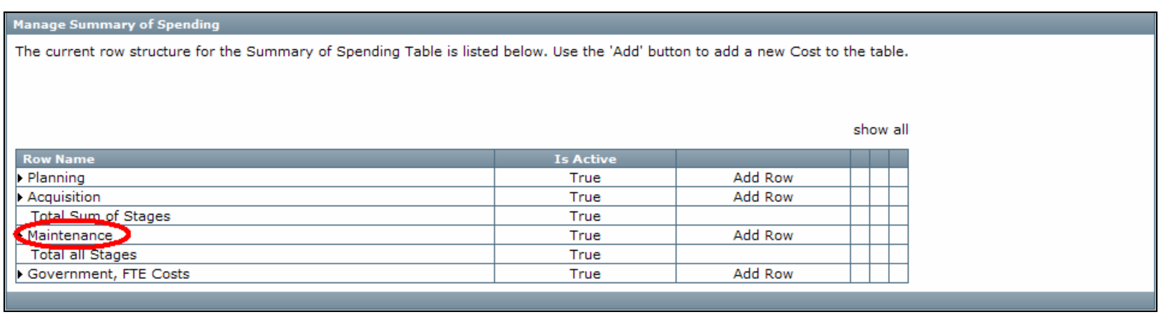
To Deactivate a Life Cycle Cost Category:

1. Click on the **Admin** module.

2. Mouse over **Investments** to reveal the drop-down menu.

3. Select **Manage Summary of Spending**.

<u>The Manage Summary of Spending form will appear</u>:


Manage Summary of Spending

The current row structure for the Summary of Spending Table is listed below. Use the 'Add' button to add a new Cost to the table.

show all

Row Name	Is Active				
Planning	True	Add Row			
Acquisition	True	Add Row			
Total Sum of Stages	True				
Maintenance	True	Add Row			
Total all Stages	True				
Government, FTE Costs	True	Add Row			

4. Click on the OMB category that contains the row that will be inactivated.

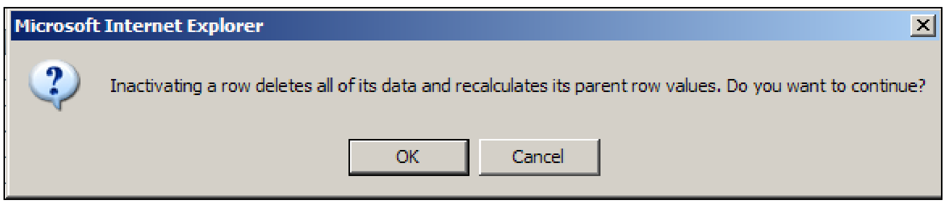
> **Note: Depending on the level of the row that will be edited, the Admin will have to keep expanding the rows using the right faced triangle or they can select the 'show all' link.**

5. Click on the **Deactivate** link. This will make the row inactive and it will not be available to users within the SOS table.

Maintenance	True	Add Row		
Level 1A	True	Add Row	Edit	
Level 2A	True	Add Row	Edit	
Level 3A	True	Add Row	Edit	Deactivate
Level 3AA	True	Add Row	Edit	Deactivate

A warning message will appear stating that inactivating the row will delete all of the data contained in the row and recalculate the parent rows values.

6. Confirm the inactivation of the category. Select **Ok**.



The row will now have an '**Activate**' link next to it and the '**Is Active**' column will now show '**False**'.

Maintenance	True	Add Row			
Level 1A	True	Add Row	Edit		
Level 2A	True	Add Row	Edit		
Level 3A	False		Edit		Activate
Level 3AA	True	Add Row	Edit	Deactivate	

Each time a System Administrator deactivates a row that is child row, the parent row will now become a child row and will be activated and available for data input. In the above example, *Level 3A* and *Level 3AA* were children of *Level 2A*, since *Level 3A* and *Level 3AA* are on the same level and *Level 3A* was deactivated, only the data in *Level 3AA*'s data will roll up to *Level 2A*. In the following example, *Level 3AA* is also deactivated, so all of the data in both rows will be deleted and these rows will not be available to see in the SOS table. The parent row, *Level 2A* now becomes a child row with a '**Deactivate**' link available. The values in the cells will be recalculated to reflect the deleted data from *Level 3A* and *Level 3AA.*

Maintenance	True	Add Row			
Level 1A	True	Add Row	Edit		
Level 2A	True	Add Row	Edit	Deactivate	
Level 3A	False		Edit		Activate
Level 3AA	False		Edit		Activate

4.1.1.3.2 Activate a Row

Once a row is deactivated, it will be available to activate at any time.

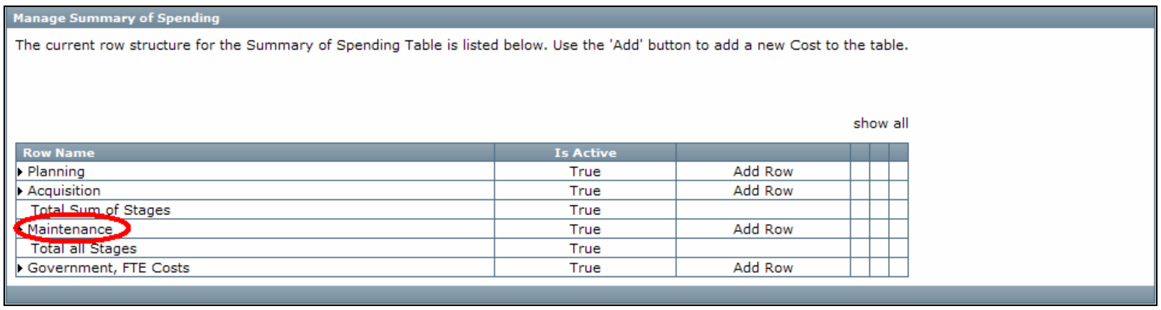
To Activate Row:

1. Click on the **Admin** module.

2. Mouse over **Investments** to reveal the drop-down menu.

3. Select **Manage Summary of Spending**.

<u>The Manage Summary of Spending form will appear</u>:



Manage Summary of Spending

The current row structure for the Summary of Spending Table is listed below. Use the 'Add' button to add a new Cost to the table.

show all

Row Name	Is Active				
Planning	True	Add Row			
Acquisition	True	Add Row			
Total Sum of Stages	True				
Maintenance	True	Add Row			
Total all Stages	True				
Government, FTE Costs	True	Add Row			

4. Click on the OMB category that contains the row that will be activated.

Note: Depending on the level of the row that will be edited, the Admin will have to keep expanding the rows using the right faced triangle or they can select the 'show all' link.

Maintenance	True	Add Row			
Level 1A	True	Add Row	Edit		
Level 2A	True	Add Row	Edit	Deactivate	
Level 3A	False		Edit		Activate
Level 3AA	False		Edit		Activate

7. Click on the **Activate** link. This will make the row active and it will be available to users within the SOS table depending on the levels the users has access to view.

The screen will refresh back to the Manage Summary of Spending table showing only the OMB categories.

show all

Row Name	Is Active				
Planning	True	Add Row			
Acquisition	True	Add Row			
Total sum of Stages	True				
Maintenance	True	Add Row			
Total all stages	True				
Government, FTE Costs	True	Add Row			

If the row that is activated was a child row, it will become a child row again and the parent row that was a child will become a parent row again.

Maintenance	True	Add Row			
Level 1A	True	Add Row	Edit		
Level 2A	True	Add Row	Edit	Deactivate	
Level 3A	False		Edit		Activate
Level 3AA	False		Edit		Activate

Maintenance	True	Add Row			
Level 1A	True	Add Row	Edit		
Level 2A	True	Add Row	Edit		
Level 3A	True	Add Row	Edit	Deactivate	
Level 3AA	False		Edit		Activate

The ‘Deactivate’ link will now appear next to the child row, while the parent row will not have a ‘Deactivate’ selection because the cells will now be grayed out within the SOS table, while the child row will be available to input data.

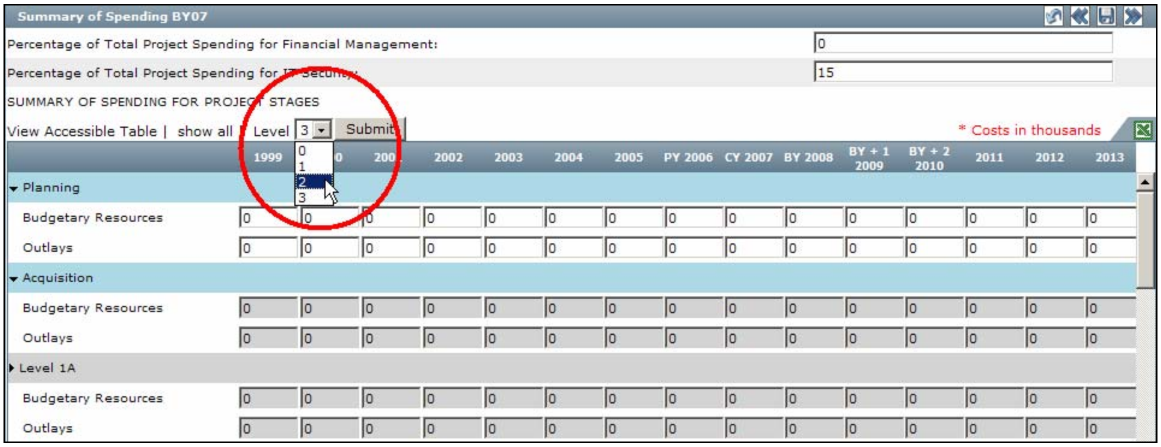
4.1.1.3.3 Set Level for Summary of Spending Table

Once the System Administrator has created additional categories, an Administrator user has the ability to designate how many rows users will be able to see per investment. This will be beneficial for those users that input data on different levels for individual investments. Therefore, for example, even if an Administrator has configured categories that stretch 12 levels deep, an investment may only show 3 levels deep in the SOS table. The Level drop-down box will show at which level the user can input financial data per investment. This box will be disabled to general users and can only be edited by the Organizational or System Administrators.

To set level of categories for an investment:

1. Click on the Investments module.\
2. Click on the Investment name for which SOS levels will be set.
3. From within the Investment, navigate to the *Exhibit 300 Process > Financial Summary Section > Summary of Spending Sub-Section.*

The Summary of Spending table will appear:

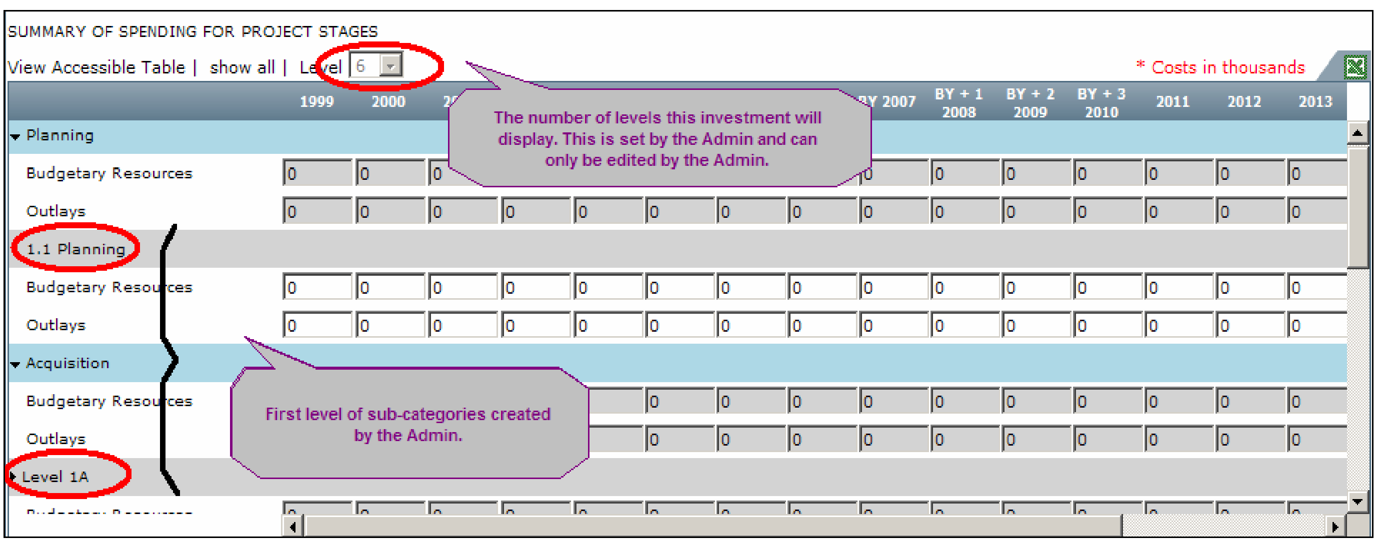


The Level drop-down box will show the amount of *activated* rows.

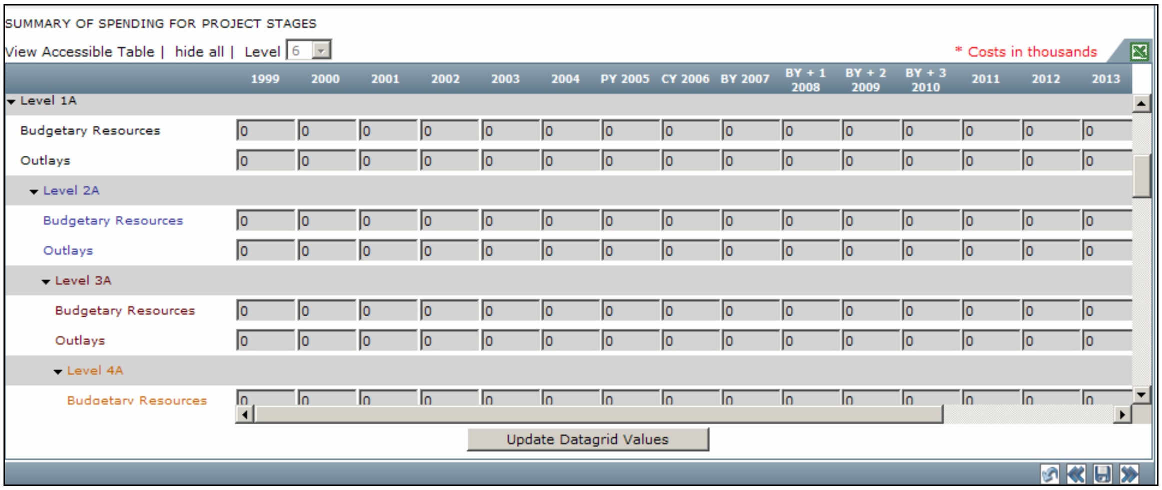
4. Select the level of categories to be seen by the general user and click **Submit**.

The Submit button will only be seen by Organizational and Global Administrators.

After SOS categories have been customized in the Admin Module and the level of data entry has been set for an investment, each time a users accesses the SOS table will display in its default view.

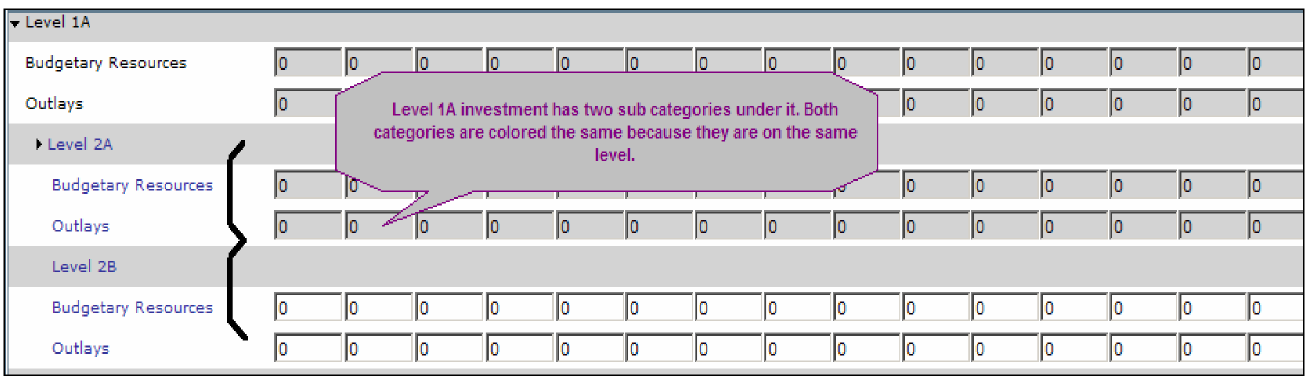


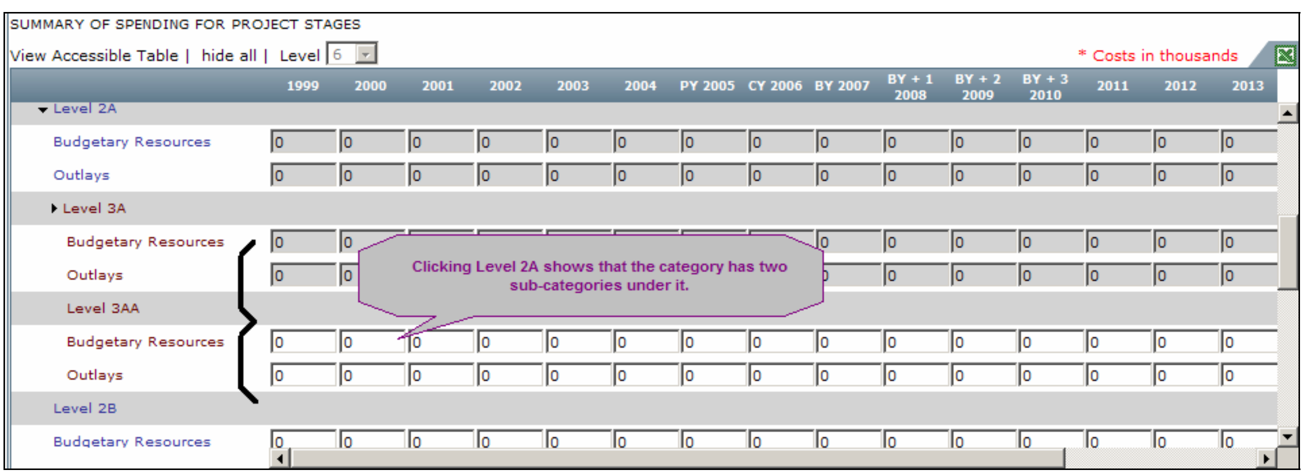
Users can then click on the **show all** link in order to display all the rows currently available in that investment's Summary of Spending table. Each level will have a designated color, which allows for users to easily recognize which categories are at similar levels.



If users only want to see certain categories and sub-categories, the SOS table has the ability to expand ▸ the view for category rows.

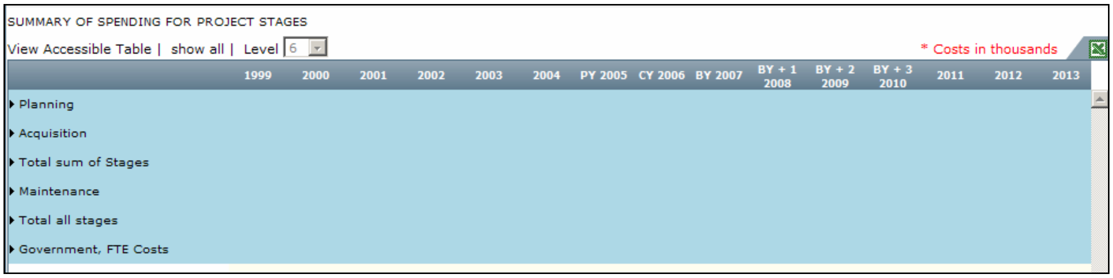
1. Click on the ▸ arrow next to the category name. This arrow means that this category has sub-categories tailored below it. The sub-categories under *Level 1A* will now be visible.



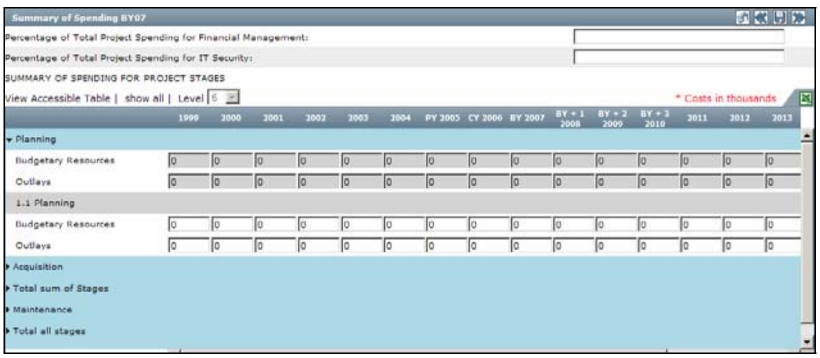


2. Click on the arrow next to the category name to collapse the row(s).

To close the entire table, click on the **hide all** link. This will collapse the entire SOS table.



From here, choose to view one category at a time by clicking on the appropriate triangle icon. For example, click on the arrow next to Planning. The Planning rows will be expanded and users will be able to see the first level of sub-categories.

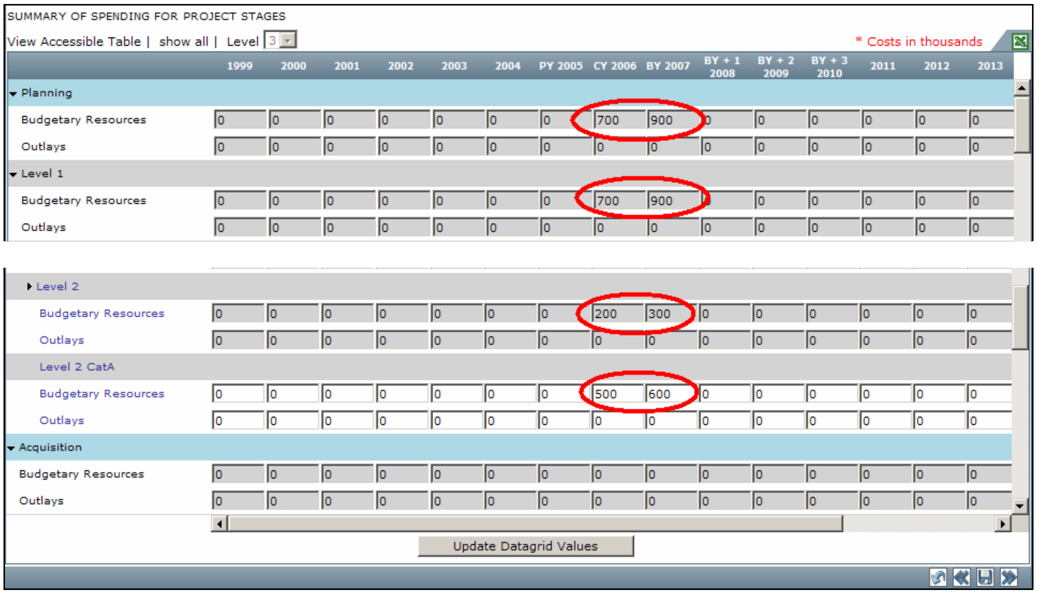


4.1.1.4 Entering Data in the Summary of Spending Table

When a System Administrator first creates a sub-category to an OMB category, the OMB category cells become 'Parent' cells whose financial information will roll up from the sub-categories. These 'Parent' cells will now be disabled and the cells will be grayed out. The values contained in each cell will represent the *sum* of its sub-categories. The 'Total Sum of Stages' and 'Total All Stages' also represent sum values, cannot be edited, and are shaded gray for visual distinction as a non-entry row. This method applies each time a sub-category is added.

For example:

If sub category *Level 1* is added to the OMB category **Planning**, the OMB category **Planning** cells are not editable. The Budgetary Resources and Outlays rows for **Planning** are grayed out. *Level 2* and *Level 2 CatA* were both added under *Level 1*, so, Level 1 cells are not editable and the cells are grayed out. The only cells that can be edited are at the lowest level.



In the screenshot above, the *Level 2* cells are not editable, while the *Level 2 CatA* cells are able to accept input from users. This is because *Level 2* has additional levels of categories tailored below it – that are hidden as indicated by the right facing triangle. The costs at Level *Level 2 and Level 2 CatA* roll up to costs of the parent, which are the *Level 1* Budgetary Resources and Outlays rows, respectively. All Level 1 categories, then roll up to the **Planning** Budgetary Resources and Outlays rows.

Once data is entered into the **Summary of Spending** table, the data is saved by pressing the **Update Datagrid Values** button. The total and 'parent' rows (i.e. any row shaded gray) within the table will be automatically calculated at this time.

Note: Data will NOT be saved by using the standard Save icon or Next and Back arrows . Users must use the Update Datagrid Values button.

4.1.1.5 Viewing Data for a Consolidated Business Case SOS Table with Tailored Categories

When there is a **Consolidated Business Case (CBC)**, the children investment's data in the **Summary of Spending** will roll up to the parent investment/CBC. To account for the roll up of SOS tables for children investments whose data entry occurs at different levels of System Administrator configured SOS rows, the system will display a 'Delta' row.

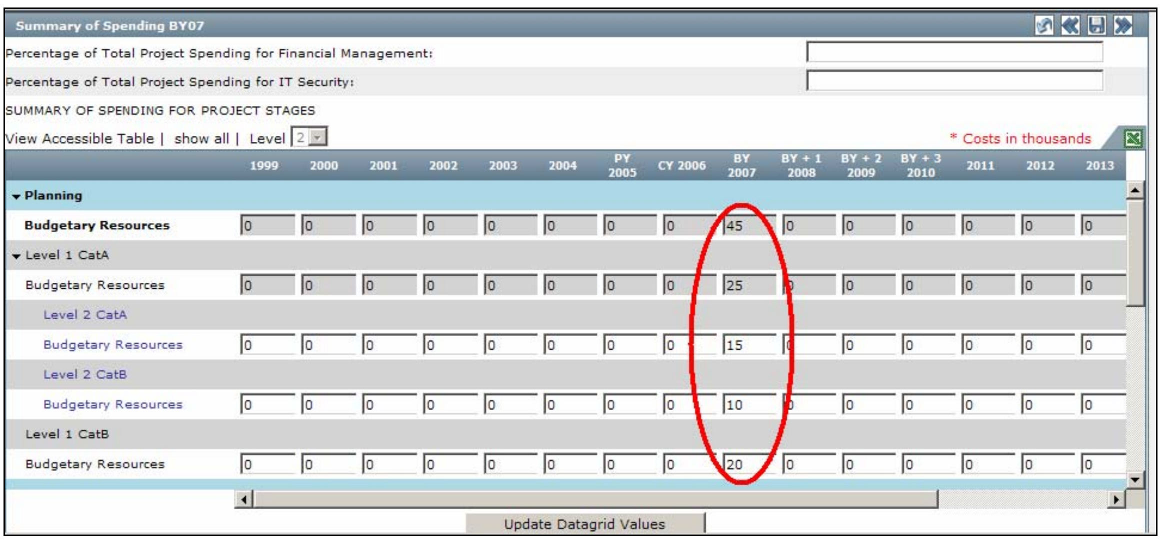
For example (Outlays rows are not displayed in the example)

Child Investment A: Administrator has set the Level to 2.

Planning:

Budgetary Resources: 45.00 (Level 1 CatA = 25 + Level 1 CatB= 20)

- Level 1 CatA:
  Budgetary Resources: 25.00 (Level 2 CatA = 15 + Level 2 CatB = 10)
    - Level 2 CatA:
      Budgetary Resources: 15.00 (value entered)
    - Level 2 CatB:
      Budgetary Resources: 10.00 (value entered)
- Level 1 CatB:
  Budgetary Resources: 20.00 (value entered)



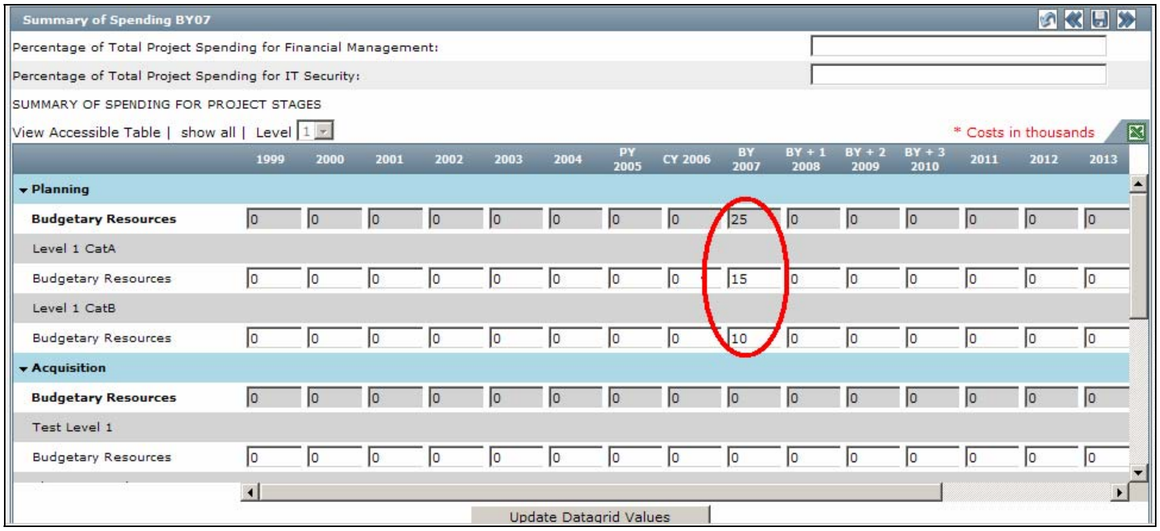
Child Investment B: Administrator has set the Level to 1.

Planning

Budgetary Resources: 25.00 (Level 1 CatA = 15 + Level 1 CatB = 10)

- Level 1 CatA:
  Budgetary Resources: 15.00 (value entered)
- Level 1 CatB:
  Budgetary Resources: 10.00 (value entered)

Note: **Level 2 CatA and Level 2 CatB are not displayed under Level 1 CatA since the Level is set to 1.**


Summary of Spending BY07

Percentage of Total Project Spending for Financial Management:

Percentage of Total Project Spending for IT Security:

SUMMARY OF SPENDING FOR PROJECT STAGES

View Accessible Table | show all | Level 1

* Costs in thousands

	1999	2000	2001	2002	2003	2004	PY 2005	CY 2006	BY 2007	BY + 1 2008	BY + 2 2009	BY + 3 2010	2011	2012	2013
Planning															
Budgetary Resources	0	0	0	0	0	0	0	0	25	0	0	0	0	0	0
Level 1 CatA															
Budgetary Resources	0	0	0	0	0	0	0	0	15	0	0	0	0	0	0
Level 1 CatB															
Budgetary Resources	0	0	0	0	0	0	0	0	10	0	0	0	0	0	0
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Test Level 1															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

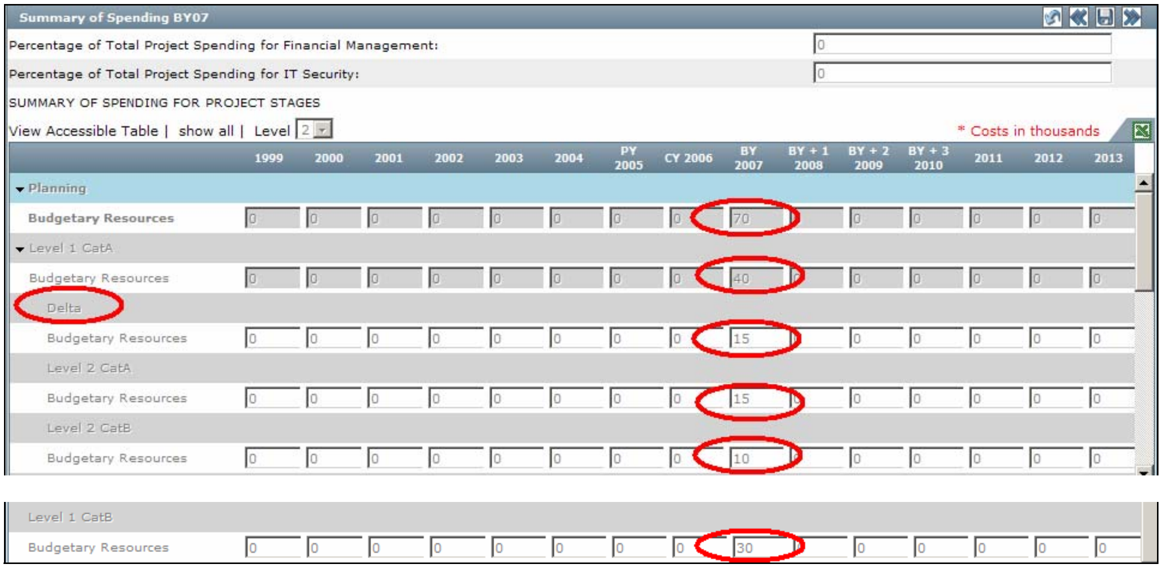
Update Datagrid Values

Parent SOS Investment with children investments (Child Investment A and Child Investment B): Display is Level 2, which is the lowest level of all child investments. Data is not editable since it is a roll up of the children investments SOS tables.

Planning:

Budgetary Resources: 70.00 (Level 1 CatA + Level 1 CatB)

- Level 1 CatA:
  Budgetary Resources: 40.00 (Rolled up value from Level 2 CatB + Level 2 CatA + Delta)
  - Delta: 15.00 (In place of the missing Level 2 CatA and CatB row in Child Investment B)
    Budgetary Resources:
  - Level 2 CatA:
    Budgetary Resources: 15.00 (Child Investment A (Level 2 CatA)
  - Level 2 CatB:
    Budgetary Resources: 10.00 (Child Investment A (Level 2 CatB)
- Level 1 CatB:
  Budgetary Resources: 30.00 (Child Investment A (Level 1 CatB)= 20.00 + Child Investment B (Level 1 CatB) = 10.00)



The ‘Delta’ row makes up for Level 2 since the reporting for Child Investment A will report from the lowest level which is Level 2.

Child Investment A (2 levels of data)	
Planning	45
Level 1 CatA	25
Level 2 CatA	15
Level 2 CatB	10
Level 1 CatB	20

Child Investment B (1 levels of data)	
Planning	25
Level 1 CatA	15
~~Level 2 CatA~~	~~0~~
~~Level 2 CatB~~	~~0~~
Level 1 CatB	10

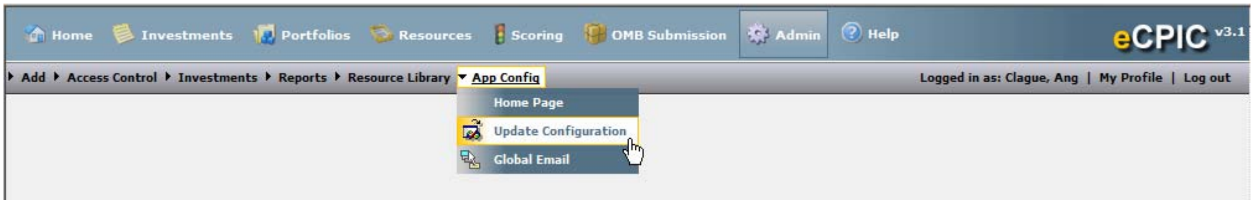
SOS Parent (CBC)	
Planning	70
Level 1 CatA	40
Delta	15
Level 2 CatA	15
Level 2 CatB	10
Level 1 CatB	30

All data in the Summary of Spending (SOS) table can be exported to Excel by clicking on the icon. The Excel export for the SOS table will export the indentation and the coloring of each level of categories.

4.1.2 New Application Configurations Settings

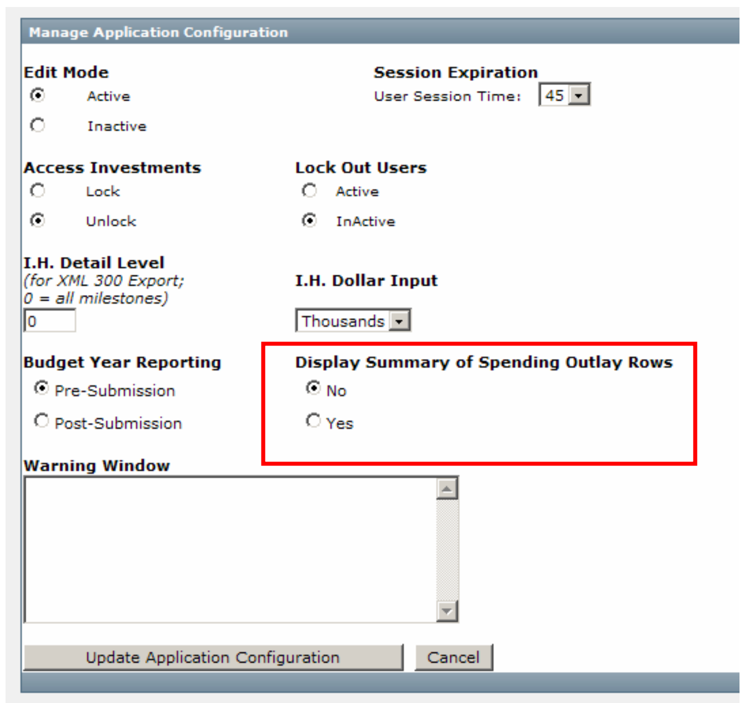
For Release v3.1, two new application configuration settings were introduced into eCPIC. These two settings are called “Display Summary of Spending Outlay Rows” and “Budget Year Reporting.” Both settings affect the display of the Summary of Spending table while the “Budget Year Reporting” setting also affects the display of the Funding Source table.

To access these settings, go to the Admin module and use the App Config → Update Configuration menu.

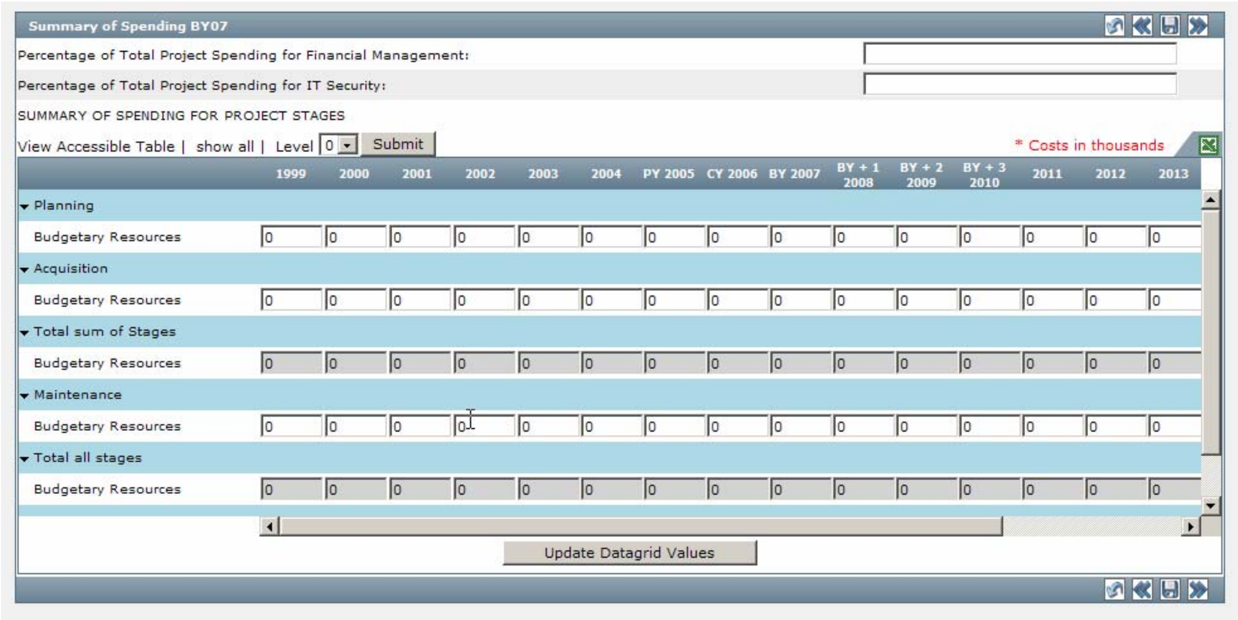


4.1.2.1 Display Outlays Setting

The "Display Summary of Spending Outlay Rows" setting determines whether the Outlay rows for each category in the Summary of Spending table is displayed to users. This setting affects all investments. By default, the setting is "Yes," which is how the SOS table is shown in the A-11 guidance.

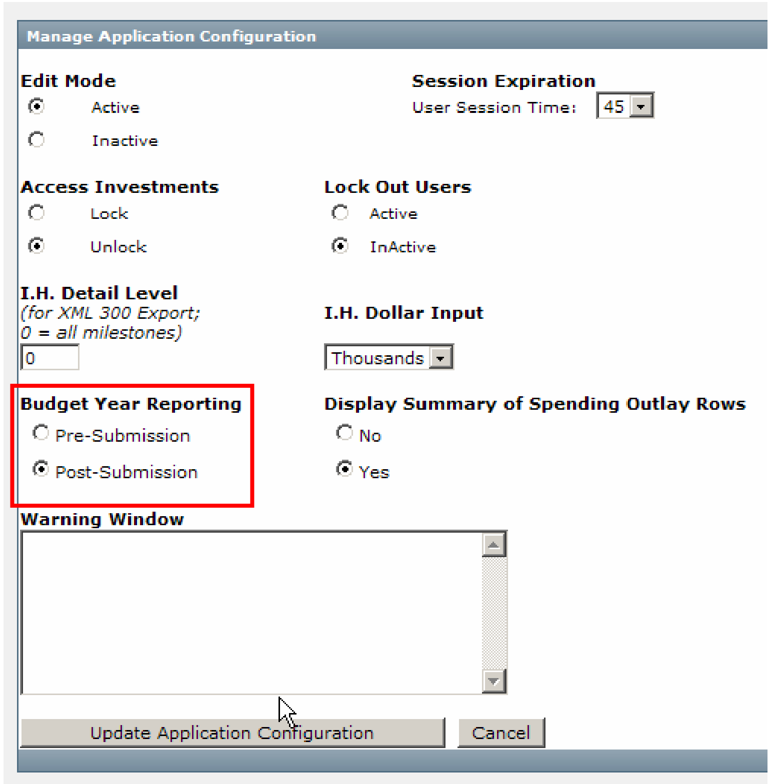


When a user accesses the Summary of Spending table with the "Display Summary of Spending Outlay Rows" set to 'No', the Outlay rows will not be displayed and Outlay data cannot be entered.

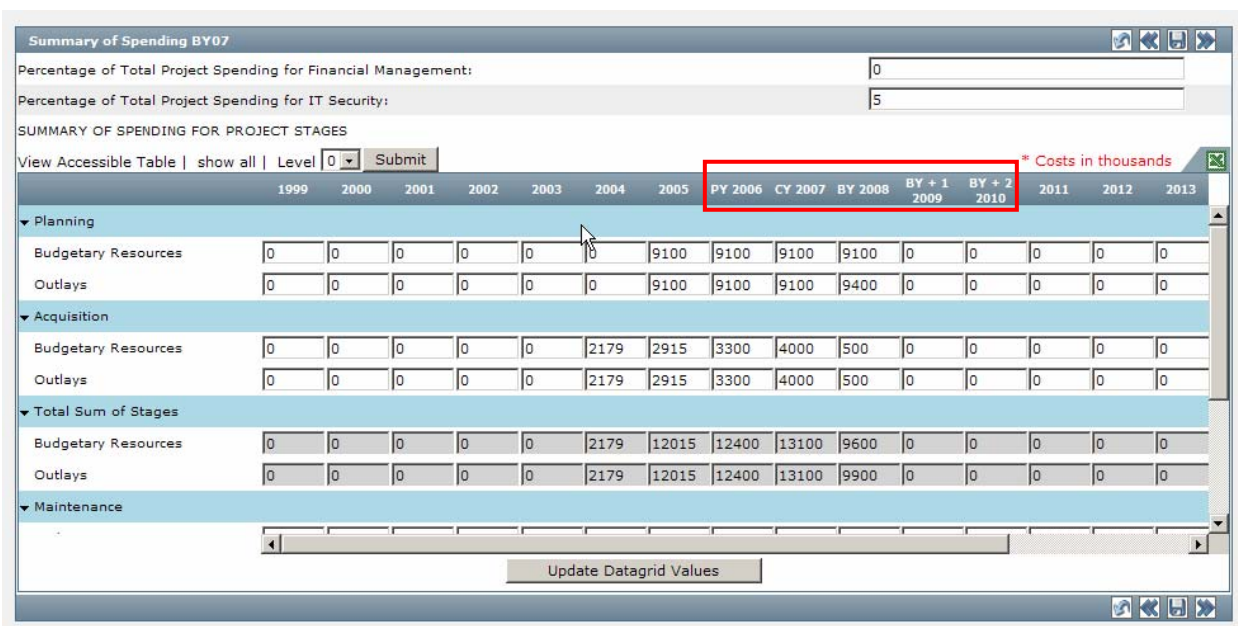


4.1.2.2 Budget Year Reporting (Pre-and Post-Submission) Setting

The “Budget Year Reporting” setting was introduced to allow agencies to begin the next year’s budget submission cycle after the passback submission is made, but before the new A-11 guidance is released. This functionality provides an interim template view without the need to make additional revisions for each investment. By default, this setting is set to ‘Pre-Submission’ meaning that the PY, CY, BY, BY+1, etc. labels on the Summary of Spending and Funding Source Table match the A-11 guidance for the template.

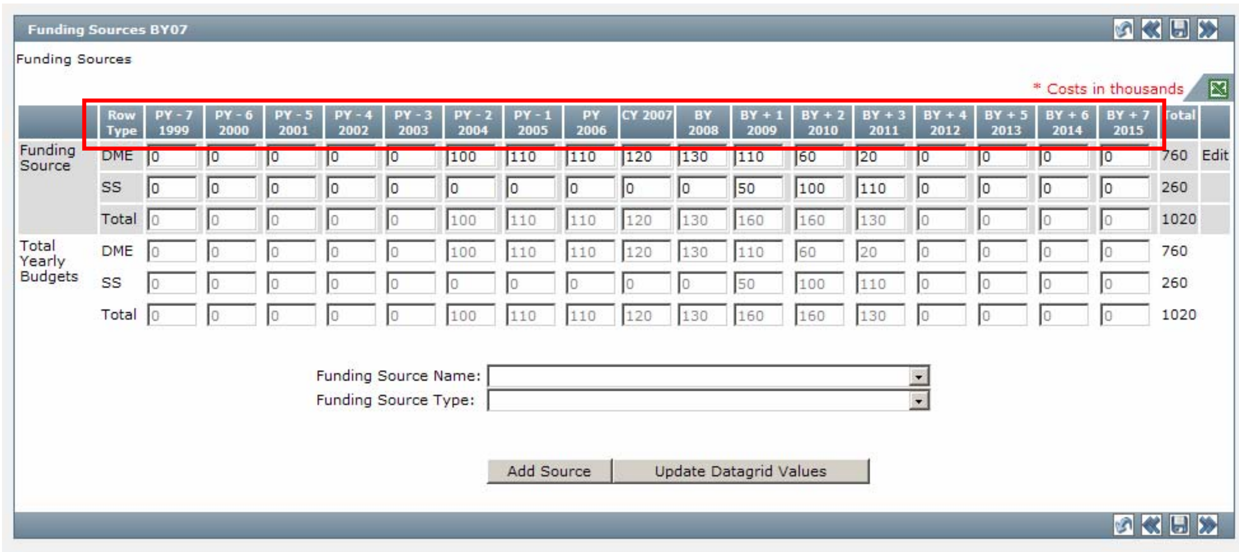


When a user accesses the Summary of Spending table with the "Budget Year Reporting" set to 'Post-Submission', the labels on the columns preceding the year will be shifted one year forward. This mean that an investment in the BY2007 template will have the CY, PY, and BY labels for the 2006, 2007, and 2008 years, respectively.



The span of years available for data entry, however, remains the same. This means years 1999 – 2015 will still be the span of years shown since that range is used for the BY07 template. When the next BY template, BY08 in this example, is released the span of years will be shifted forward by one year to encompass 2000-2016.

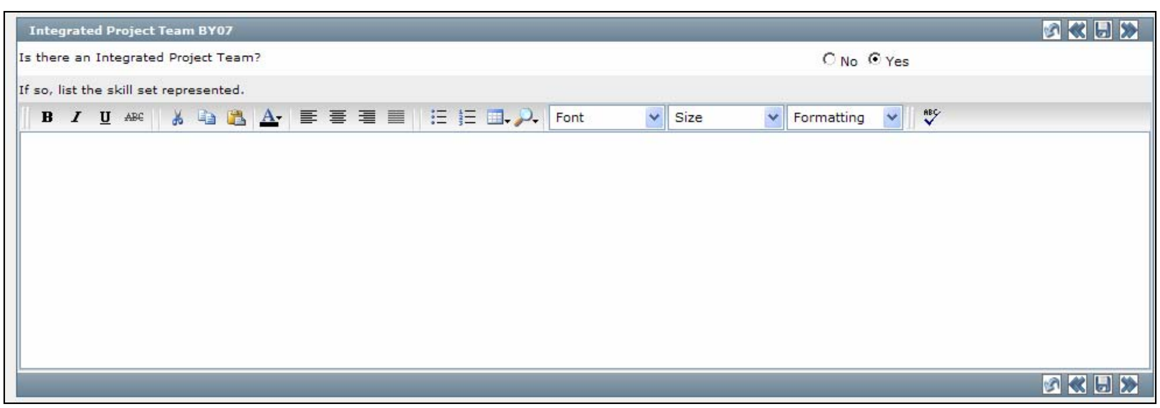
Similar to the SOS table, when the "Budget Year Reporting" is set to 'Post-Submission', the labels on the columns preceding the years will be shifted one year forward for the Funding Source table as well.



4.1.3 Rich Text Areas

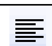
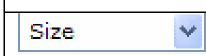
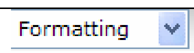
With the release of version 3.1, some text areas within the eCPIC application will allow for Rich Text format (RTF), i.e. formatted text, instead of simply plain (unformatted) text. These fields will be areas with a markup tool bar above the text area.

Note: Upon upgrade, all text areas within eCPIC (except the OMB Short Description) will be changed to rich text areas



When importing and exporting investments from/to XML and exporting investments to Word, all formatted text, HTML tags, and special characters will be transmitted. This enables readers to view written text in a much easier way. It also saves the user time from having to format the text manually. Additionally, during data entry the cut and paste will now carry over all formatting into the Rich Text Area from Word Processing tools, such as MS Word.

The following are available features that can be used to format text within a Rich Text area:

	Bold font type		Italic font type
	Underline font		Strikethrough
	Font color		Justify Left
	Justify Center		Justify Right
	Justify Full		Unordered List
	Ordered List (Numbered List)		Display Table Menu- Able to insert and format table
	Zoom to different percentages		Font types
	Font size		Formats available
	Check Spelling		

Note: When inserting a table in the Rich Text control set the table width at 95% to prevent horizontal scrolling in the rich text area

Note: To insert a Microsoft Excel table into the Rich Text control, place borders around the cells in Excel. This will render the table appropriately when copied into the Rich Text control.

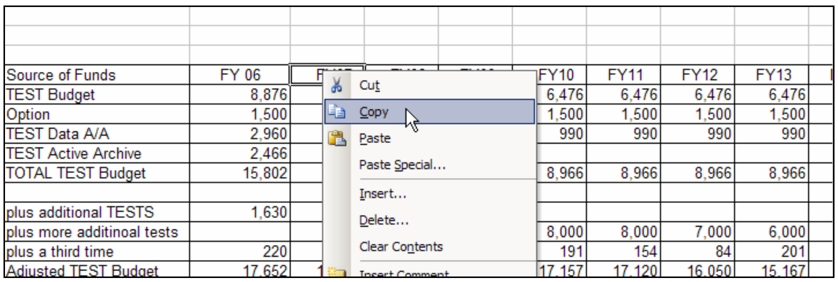
4.1.3.1 Preferred Method of Cutting and Pasting Tables from Excel into Rich Text Areas of eCPIC for Printing Word Exports

When users copy and paste Excel tables into Rich Text Areas within eCPIC, they may find that when exporting to Word, the table and text may run off the page. This is due to the fact that when the table is pasted into the Rich Text Area it is set at a fixed width.

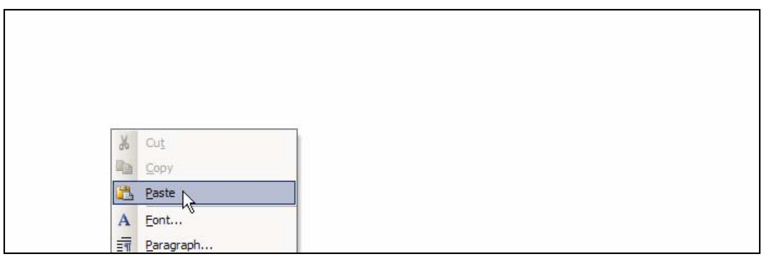
If users have an Excel selection that they want to paste into a Rich Text Area, below is the preferred method. This method will be a one time adjustment. When exported to Word, the table will already be fixed and will not need any other adjustments.

1. From within the Excel document, highlight the selected text, right click mouse and select **Copy**.

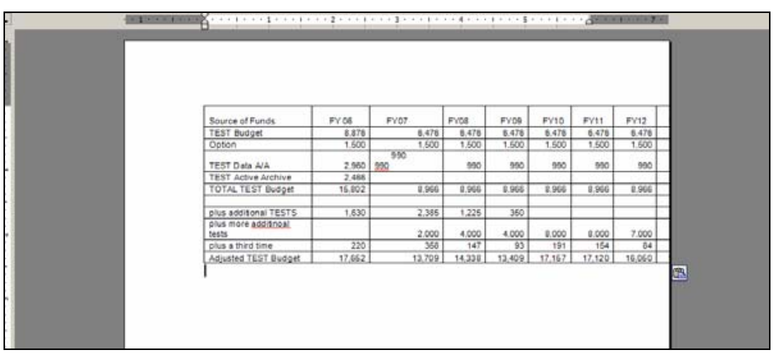
Note: To insert a Microsoft Excel table into the Rich Text control, place borders around the cells in Excel. This will render the table appearance appropriately when copied into the Rich Text control.



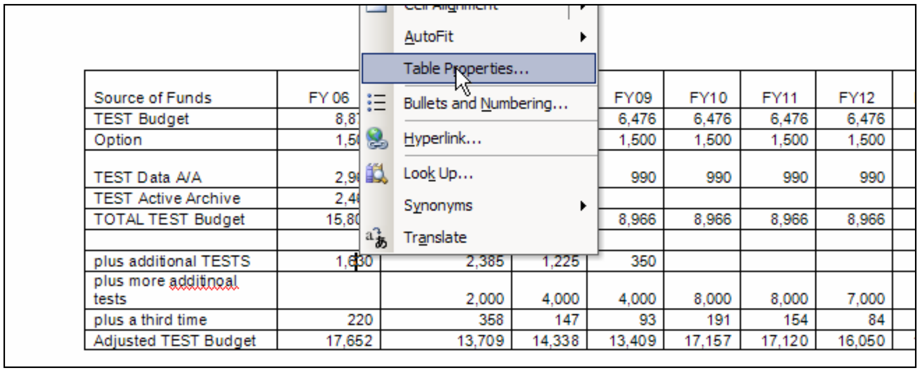
2. Open a new Word document and right click mouse. Select **Paste**.



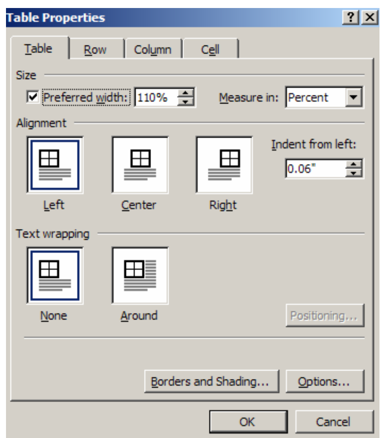
The selected text will appear in the Word document and the table may run off the page as the below example is showing.



3. Right click and select **Table Properties**.

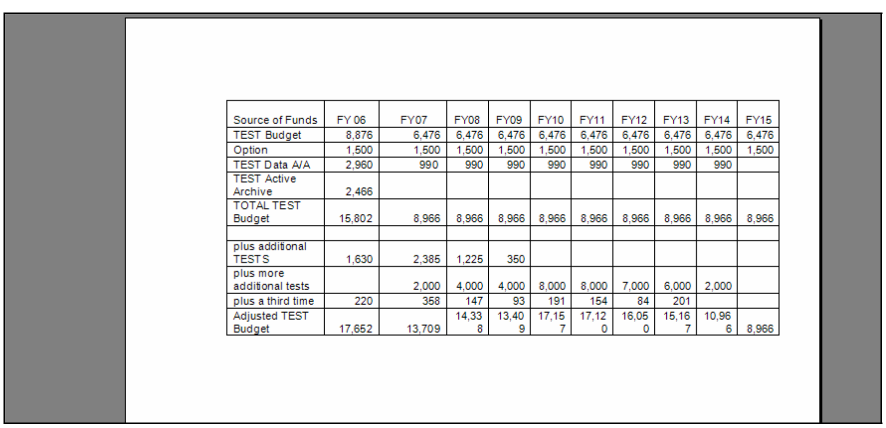


4. Change the Measure to **Percent** and adjust the Preferred width until the table is fixed and all data is being captured on the page.



5. Click **OK.**

Below, the Preferred width was adjusted until the table fit appropriately on the page.



Source of Funds	FY 06	FY07	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15
TEST Budget	8,876	6,476	6,476	6,476	6,476	6,476	6,476	6,476	6,476	6,476
Option	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500
TEST Data A/A	2,960	990	990	990	990	990	990	990	990	
TEST Active Archive	2,466									
TOTAL TEST Budget	15,802	8,966	8,966	8,966	8,966	8,966	8,966	8,966	8,966	8,966
plus additional TESTS	1,630	2,385	1,225	350						
plus more additional tests		2,000	4,000	4,000	8,000	8,000	7,000	6,000	2,000	
plus a third time	220	358	147	93	191	154	84	201		
Adjusted TEST Budget	17,652	13,709	14,338	13,409	17,157	17,120	16,050	15,167	10,966	8,966

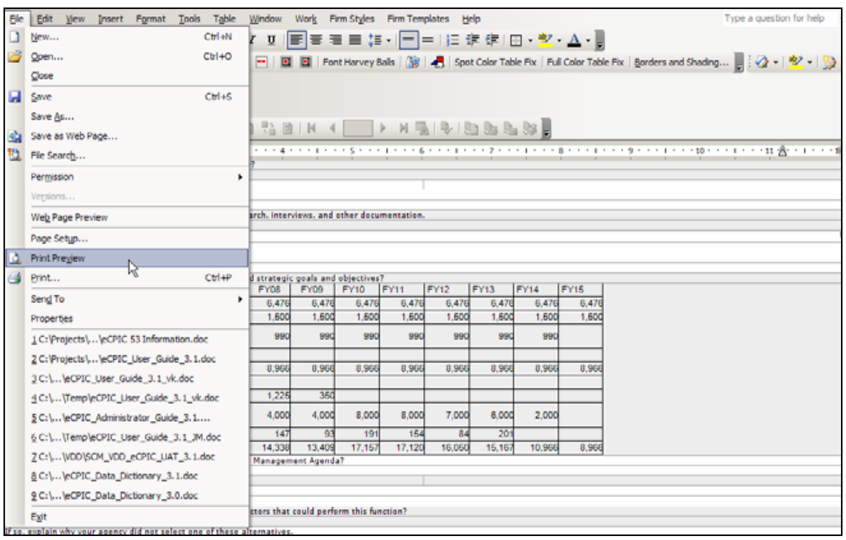
6. At this point, users can copy the formatted document into the Rich Text Area of eCPIC.

4.1.3.2 Troubleshooting Printing Word Documents Containing Pasted Excel Tables in Rich Text Areas of eCPIC

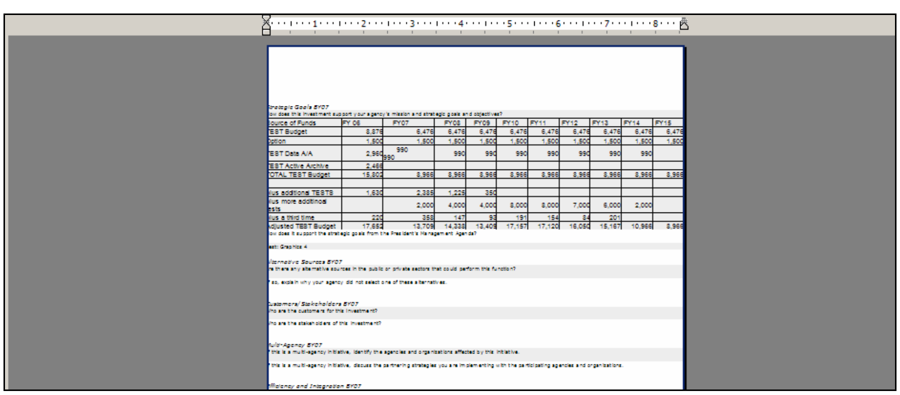
If users have already pasted their Excel table in the Rich Text Area, they can follow the steps below or utilize the suggestions listed above. From within the exported Word document, the document may appear to look as if all text fits properly, however, once the user selects Print Preview the document may show text that is running off the page.

1. From within the Word document, click **File** from the menu.

2. Select **Print Preview**.

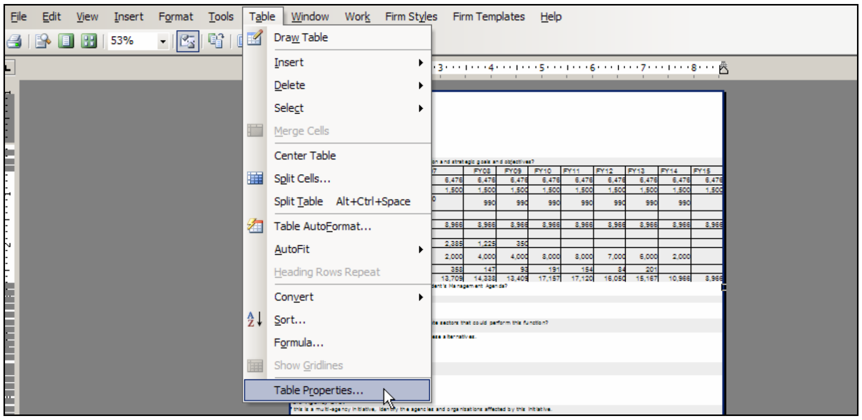


In the Print Preview screen, some users may notice that the table that was pasted into the Rich Text Area from Excel, is running off the page.

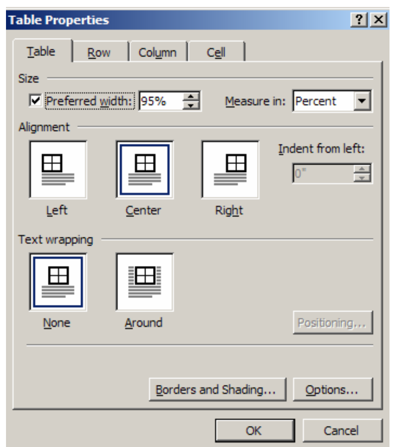


3. From within the Print Preview screen, select **Table** from the menu.

4. Select **Table Properties**.

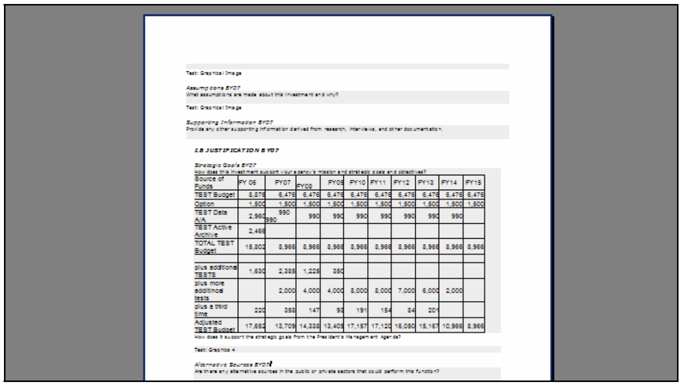


5. Change the Measure to **Percent** and adjust the Preferred width until the table is fixed and all data is being captured on the page.



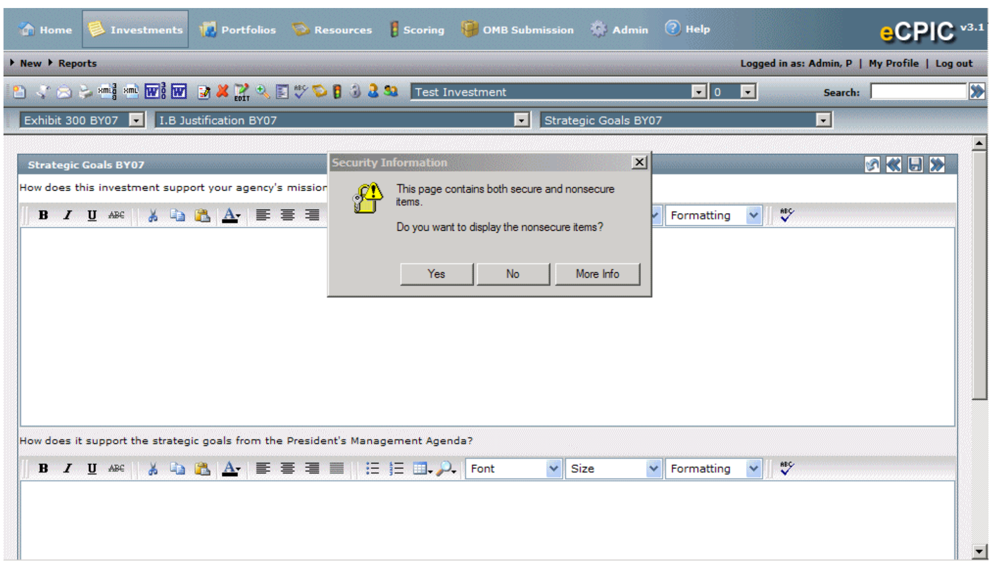
6. Click **OK.**

Below, the Preferred width was adjusted until the table was fitted appropriately on the page.

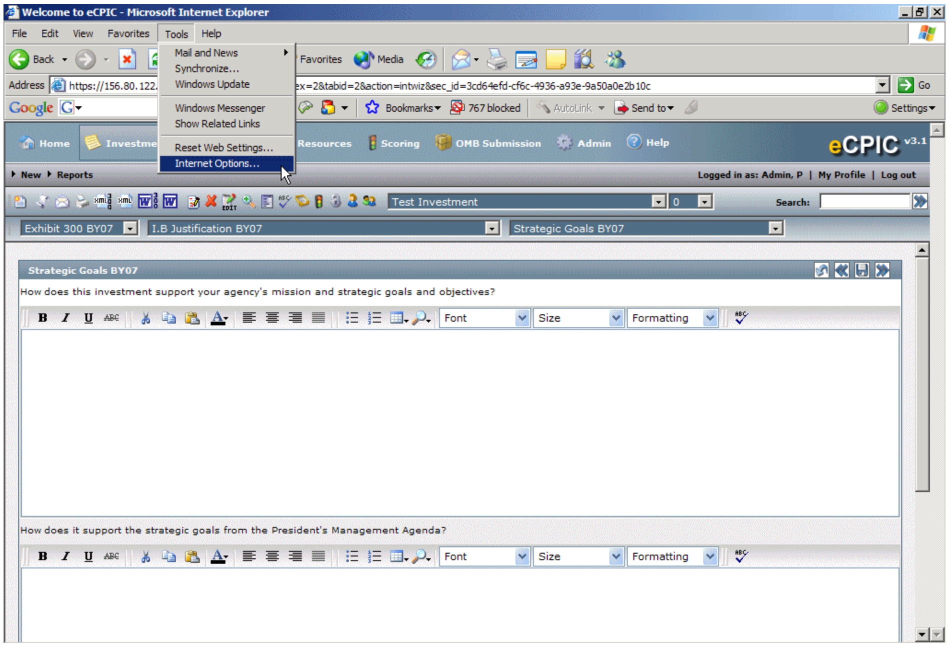


4.1.3.3 Rich Text Box Pop-Up Security Warning

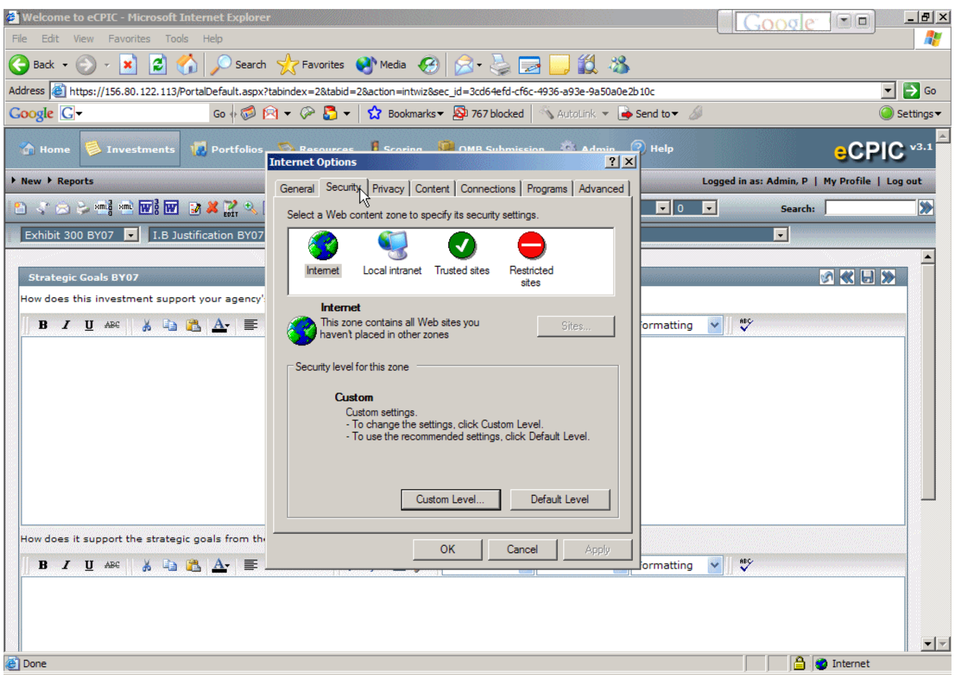
While attempting to insert a table within the rich text box, if you encounter a “Security Information” alert box, as shown in the image below, the following steps should be taken to suppress this confirmation box.



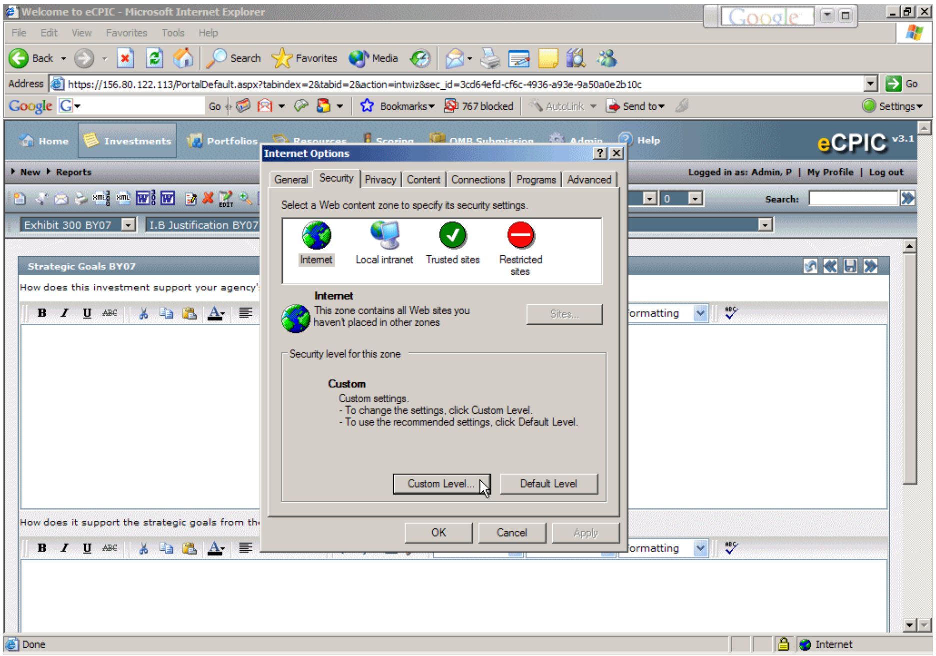
In the Internet Explorer web browser, go to the Tools and select Internet Options.



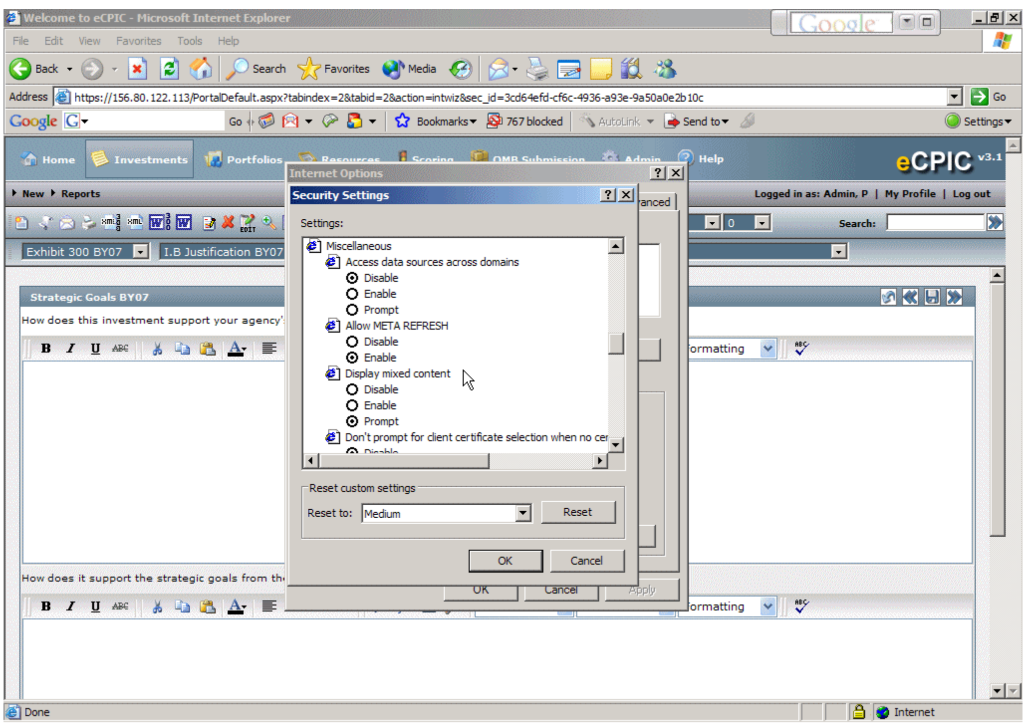
Select the Security Options tab within the Internet Options window.



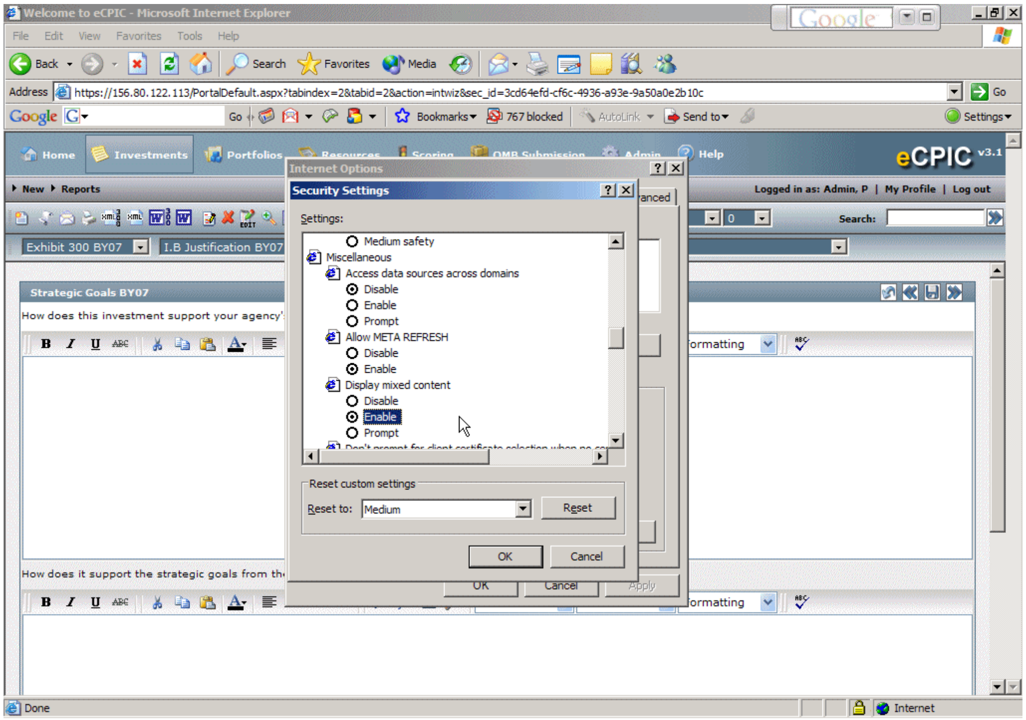
Click on the Custom Level… button located at the bottom of the Security tab.



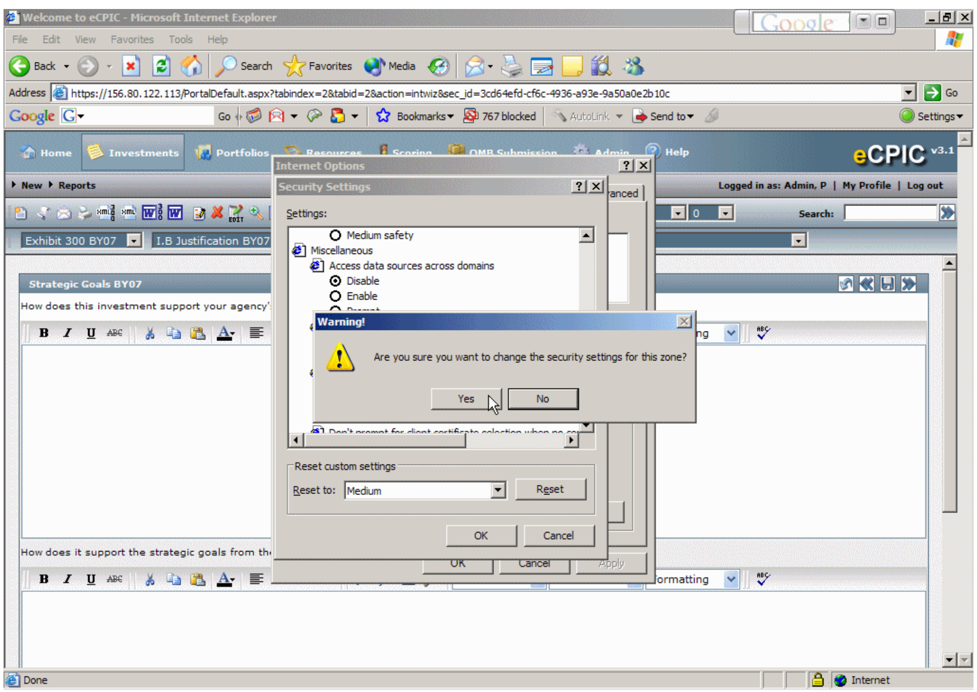
Scroll down to the Miscellaneous / Display Mixed Content option.



The cause of the security popup is due to the radio button selection being set to “Prompt”. Select the “Enable” radio button option and click “OK”.



Click “Yes” for the “Are you sure you want to change the security settings for this zone?” prompt that then appears:



Close out the remaining windows and restart the web browser. The security prompt should now not appear when attempting to insert a table in the rich text area.

4.1.4 EA Assessment Scorecard

On upgrade to Release v3.1, the EA Assessment Scorecard will be inserted into the eCPIC Database if it has not been previously inserted via the database script posted to the ERC in the beginning of January 2006. If the EA Assessment Scorecard already exists, no alterations will be made. Therefore, any changes made to the configuration of the scorecard subsequent to it being added to eCPIC will remain unchanged. Below are the fields included in the EA Assessment Scorecard and the corresponding Section and SubSection.

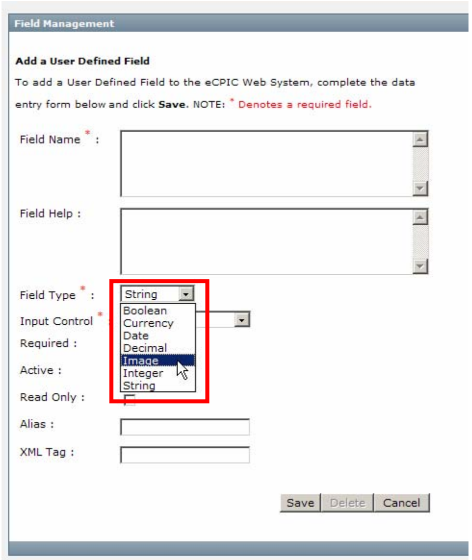
EA Assessment Scorecard:

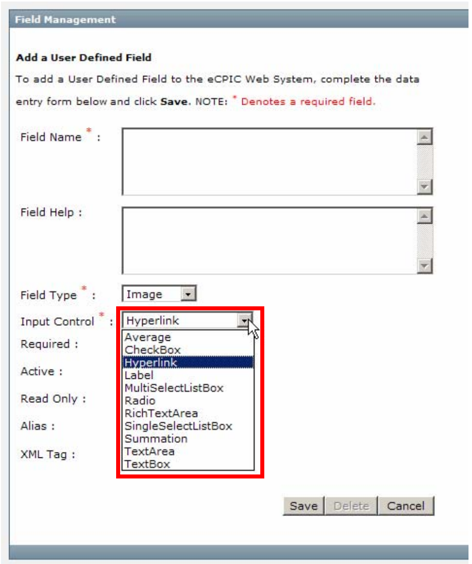
Section	Sub-Section	Field
	None	**EA: 1.3 COMPLETION CAPABILITY AREA**
I.C. Performance Goals and Measures	**FEA Performance Reference Model (PRM)**	*EA: 1.3.1 Performance Architecture*
Enterprise Architecture - Business	**FEA BRM**	*EA: 1.3.2 Business Architecture*
Enterprise Architecture-Data	**Information Quality and Management**	*EA: 1.3.3 Data Architecture (Information Management)*
Enterprise Architecture-Application, Components and Technology	**FEA Service Component Reference Model (SRM)**	*EA: 1.3.4 Service Component Architecture*
Enterprise Architecture-Application, Components and Technology	**FEA Technical Reference Model (TRM)**	*EA: 1.3.5 Technology Architecture*
	None	*EA: 1.3.6 Transition Strategy*
	None	**EA: 1.4 USE CAPABILITY AREA**
	None	*EA: 1.4.1 EA Governance and Management*
	None	*EA: 1.4.2 EA Change and Configuration Management*
	None	*EA: 1.4.3 Federation of Enterprise and Segment Architectures*
	None	*EA: 1.4.4 EA Deployment*
	None	*EA: 1.4.5 CPIC Integration*
	None	**EA: 1.5 RESULTS CAPABILITY AREA**
	None	*EA: 1.5.1 Business Driven*

Section	Sub-Section	Field
	None	*EA: 1.5.2 Collaboration and Reuse*
	None	*EA: 1.5.3 Business Process and Service Improvement*
	None	*EA: 1.5.4 IT Implementation Improvement*
	None	*EA: 1.5.5 E-Gov, Line of Business, and SmartBUY Alignment and Implementation*
	None	*EA: 1.5.6 IPv6 Planning*

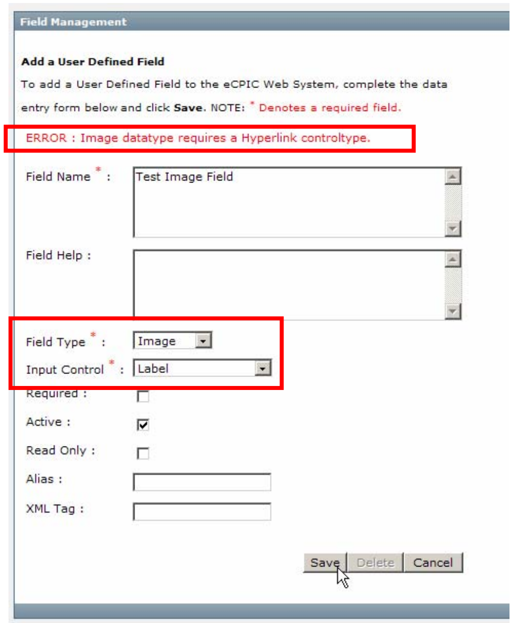
4.1.5 Image Field Type

The 'Image' field type was added into the eCPIC application for Release v3.1. This field type allows for files of certain image formats (JPG, BMP, and GIF) to be uploaded inline with other fields in the investment workflow. The System Administrator must create the new field and add it to a template, process, section, and subsection to make it available to users. When creating an image field, the Field Type should be set to 'Image' and the Input Control must be set to 'Hyperlink'

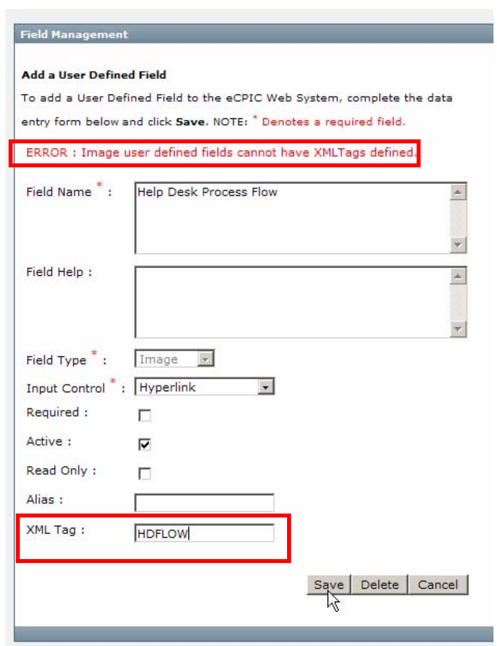




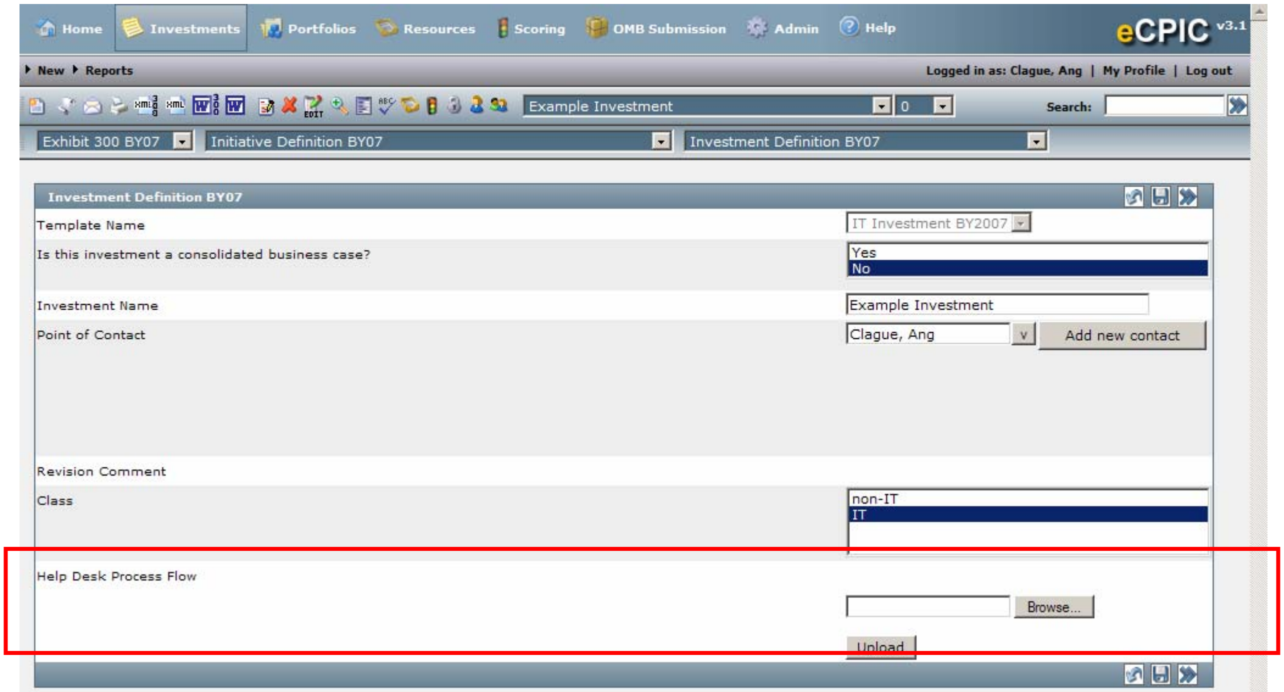
If the Administrator tries to set the input control to something other than 'Hyperlink' for a field that is of type 'Image', a validation warning will appear on the Add field page and the new field will not be created.



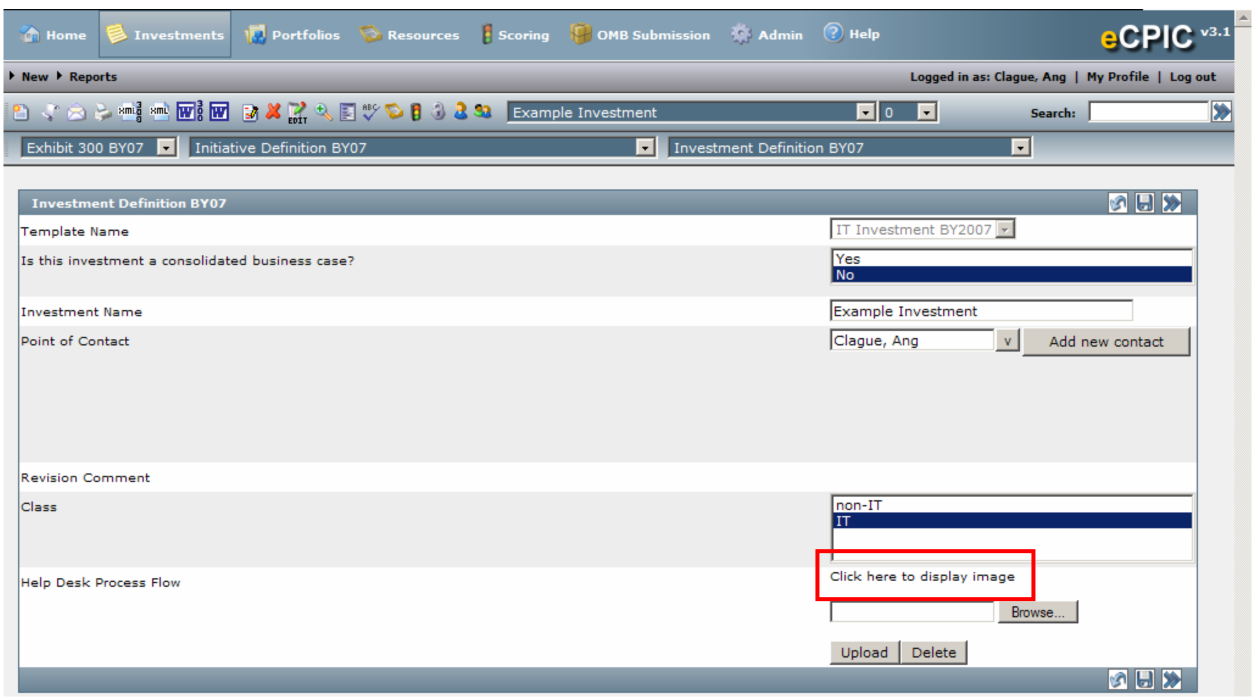
Please also note that for performance reasons, images are not exported to or imported from XML at this time with the exception with the Cost Curve image described below. As such, trying to associate an XML tag with a field of image type will produce an error warning. Images, however, will be maintained upon creating revisions of investments.



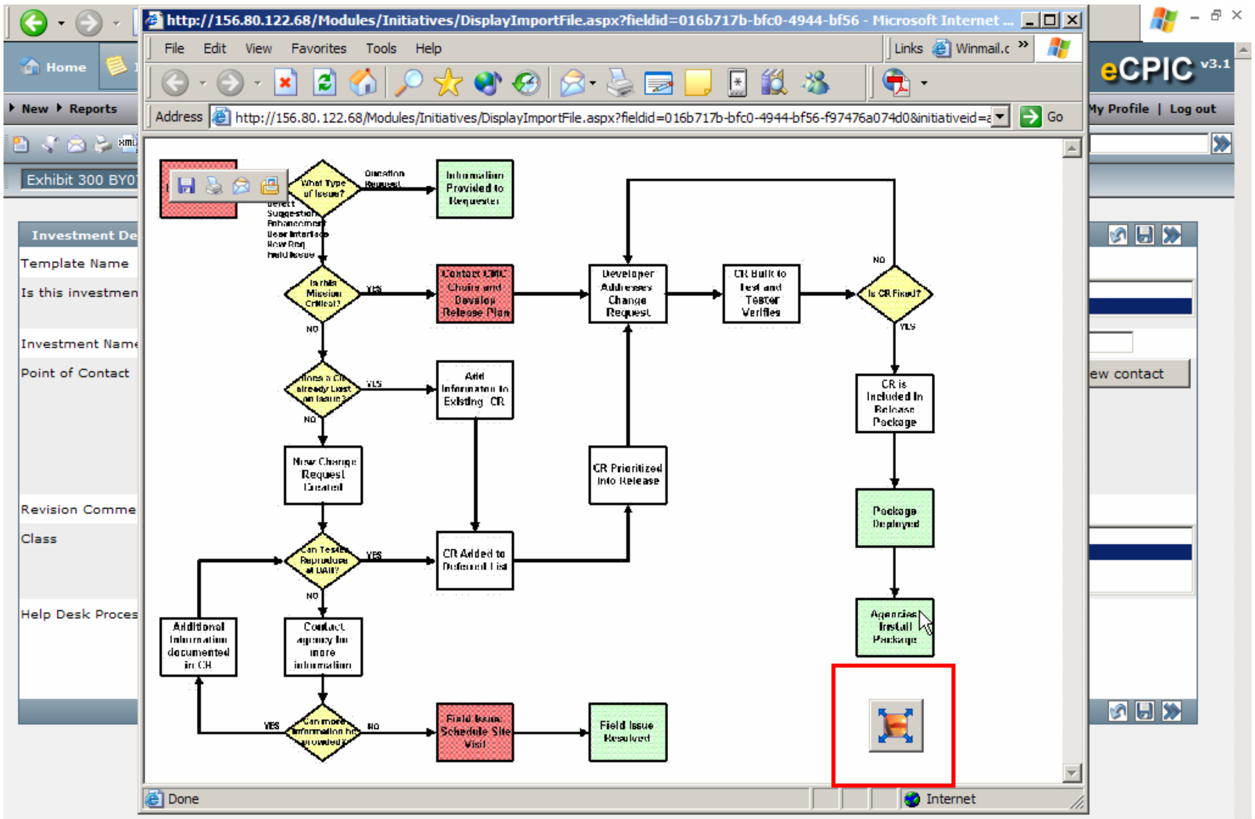
In the following example, the image field ‘Help Desk Process Flow’ has been added to the Initiative Definition Section and Initiative Definition Sub-Section of the Exhibit 300 Process in the IT Investment BY2007 template.



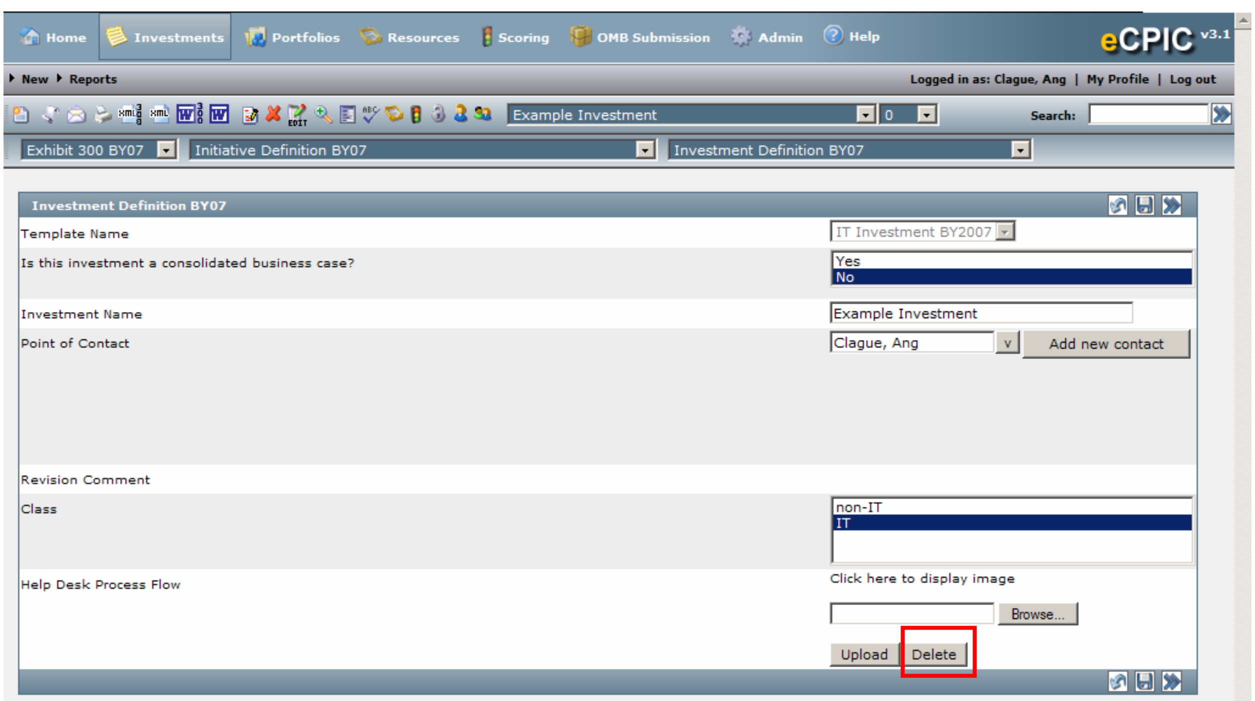
To add the image to the field, click the Browse button, select the appropriate image file from the client computer, and hit upload. Once the page refreshes, a link will appear above the selection area that displays the image.



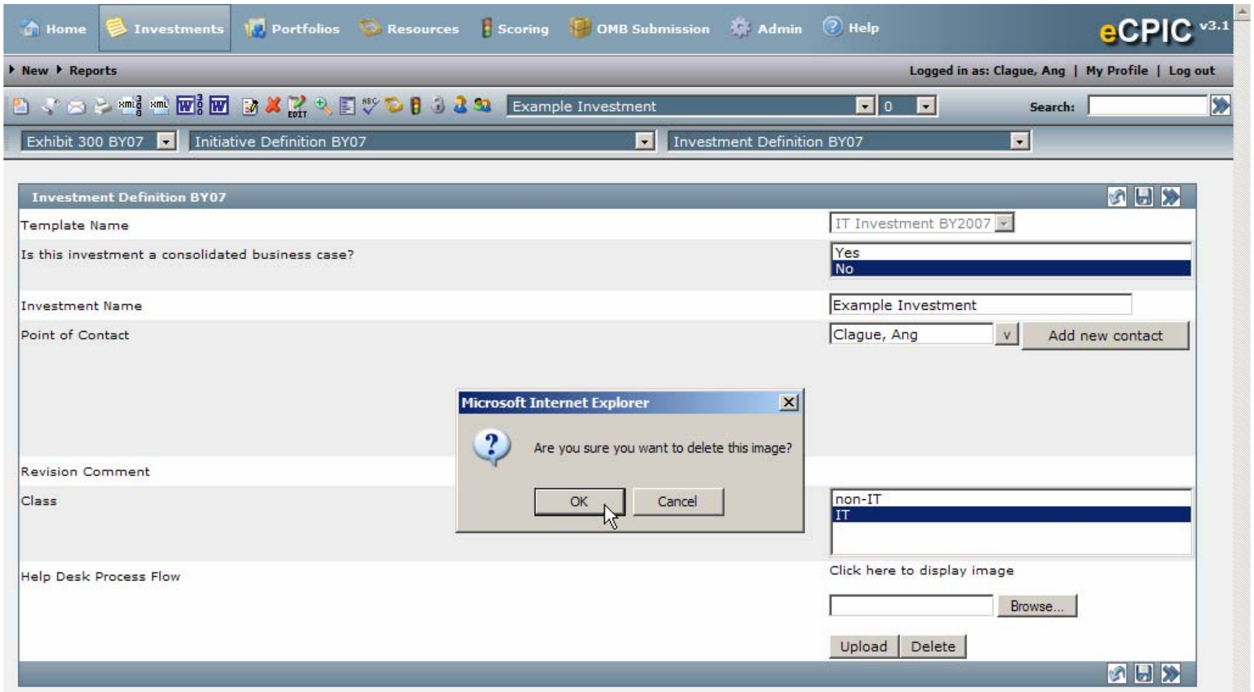
Clicking on the ‘Click here to display image’ link displays a pop-up window with the image. The image in the pop-up may not be displayed at its true size and as a result suffer some quality degradation (web browser dependent). To expand the image to its regular size, click on the expansion icon that will appear in the bottom right corner of images in Internet Explorer.



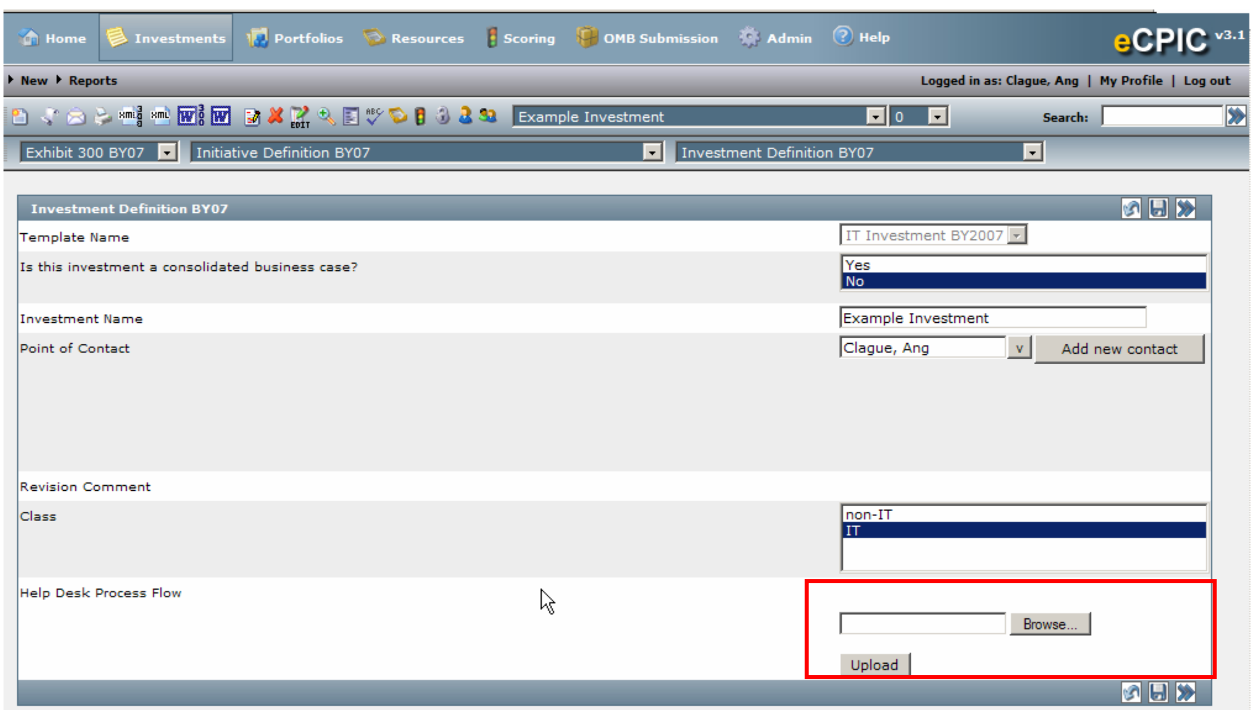
The presence of the ‘Click here to display image’ link indicates that an image is associated with the field. To replace the image for a field, simply click the Browse button, select the appropriate image file from the client computer, and hit upload once again. To remove the file from the image field, click on the delete button.



A confirmation pop-up will appear when a user attempts to remove the image from the field by pressing delete.



Once the delete is confirmed, the link to the image will no longer be associated with the image field. Note that there is no image associated with the image field.



4.1.5.1 Image File Sizes

When uploading files to the server, your file size is limited based upon the httpRuntime element in your application's web.config. The default size for file uploads is 4MB. If you wish to allow uploads of files larger than 4MB, you must add or modify the maxRequestLength property of the httpRuntime node. The value that you place into the maxRequestLength should be in KB (i.e. 4MB = 4096 KB). The following is an example of the property being extended to 15MB.

```
<configuration>
      <system.web>

         <httpRuntime executionTimeout="3600"
            useFullyQualifiedRedirectUrl="true" maxRequestLength="15360" />

      </system.web>

</configuration>
```

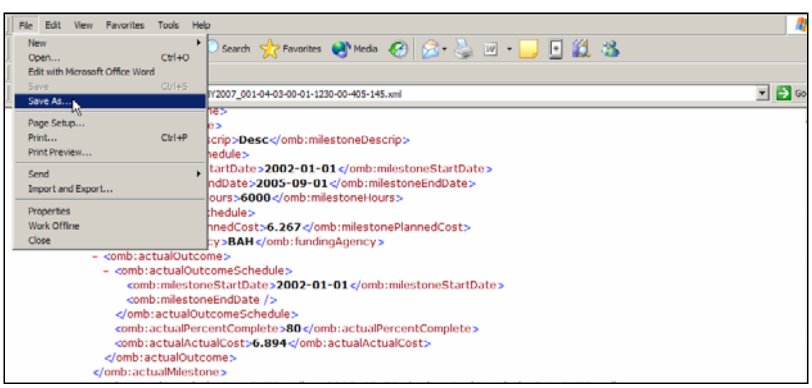
For more information on this setting, please refer to [httpRuntime Element]().

4.1.5.2 Cost Curve

For Release v3.1, a new image field has been added to capture the cost curve (existing as .gif, .bmp, or .jpeg file). This field is included in the XML 300 and Full XML exports and can also be imported into the application via XML. Two things to note: 1) the cost curve field is the only image that is available for import and export via XML. Secondly, when users export to XML, they will not be able to see the image in the XML file itself. The image will be encoded to base 64 and the encoding will be included in the XML file.

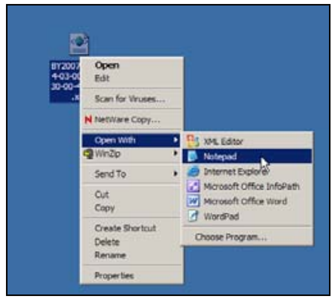
In order to see the encoding:

1. Click **File** from the XML page.
2. Select **Save As**.
3. Save the XML to local machine.



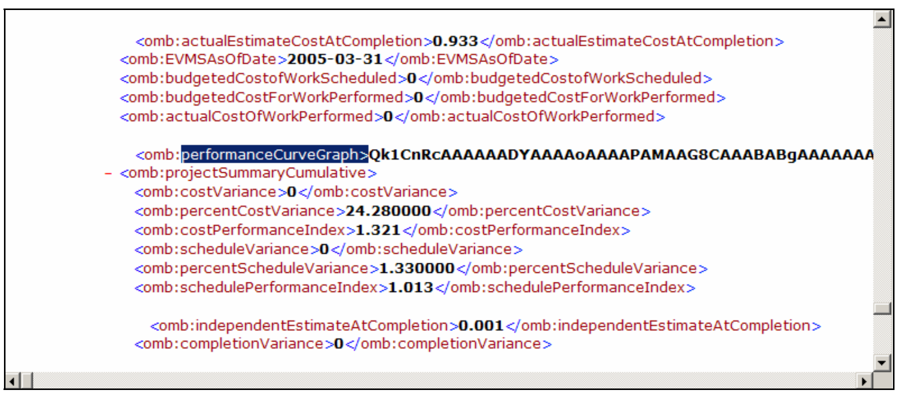
4. Go to the location that for which the XML was saved and highlight the filename.

5. Right click and select **Open With**.



6. Select **Notepad**.

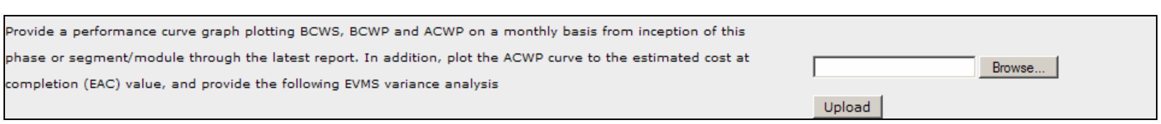
7. Once the document is opened, users can **CTRL+F** and enter ***performancecurve*** to Find Next. This will take users directly to the image coding.



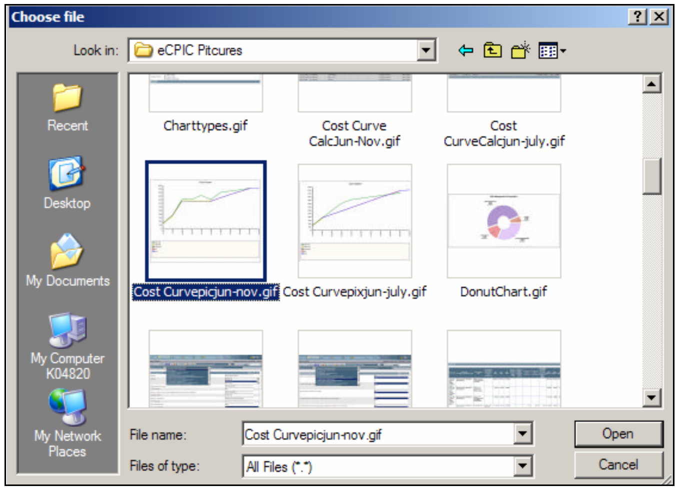
When the XML file is sent to OMB, they will encode the coding to see the actual image.

To import a cost curve or other image:

1. Click on the **Browse** button next to the field, "Provide a performance cost curve….."



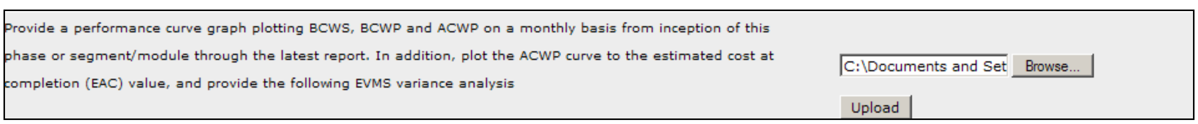
<u>The Choose File window will appear:</u>



1. Select the location from which the image is located.

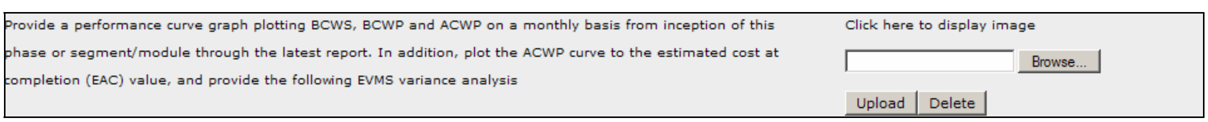
2. Highlight the image and click **Open** so that the file name is populated with the image being planned to Upload.

The filename will now populate the Upload textbox.

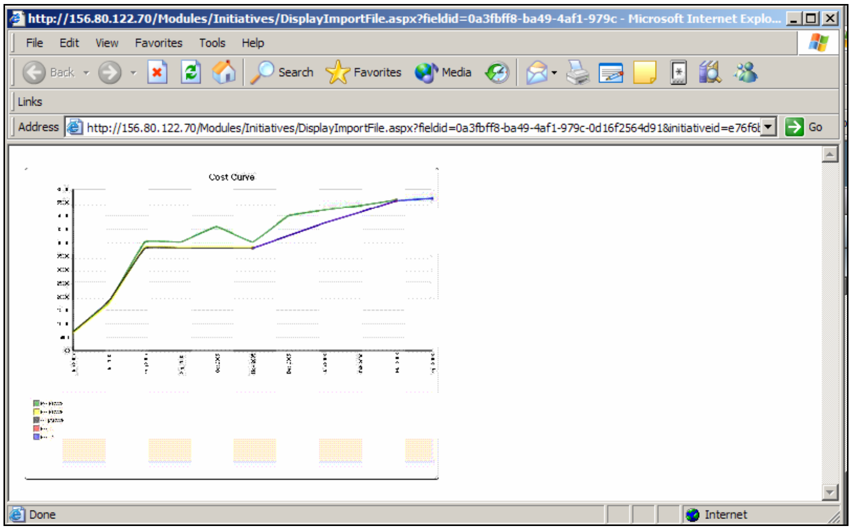


3. Click the **Upload** button to import the file.

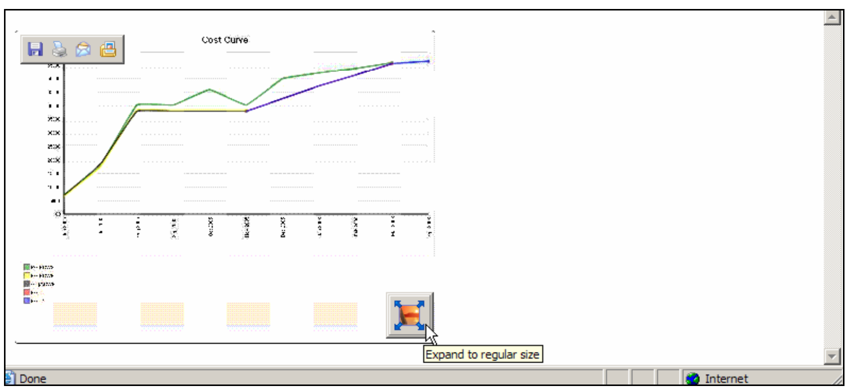
Once users have uploaded the file, they will now see **Click here to display image**.



Clicking on this link will display the imported image in a new window.



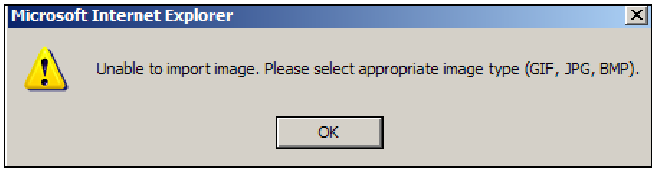
The new image in the pop-up may not be displayed at its true size and as a result suffer some quality degradation (web browser dependent). To expand the image to its regular size, click on the expansion icon that will appear in the bottom right corner of images Internet Explorer.



Note: The only image that can be exported to or imported from XML is the Cost Curve image located in the *I.H. Project (Investment) and Funding Plan* Section and *Project Summary (EVMS)* Sub-Section. An Agency-defined image field will not export to or imported from XML.

Note: Images will be maintained upon creating revisions of investments.

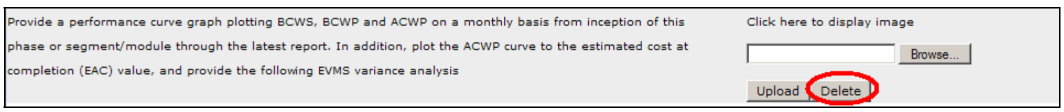
If a user tries to upload any other type of file to an image field (including the cost curve), they will receive a warning.



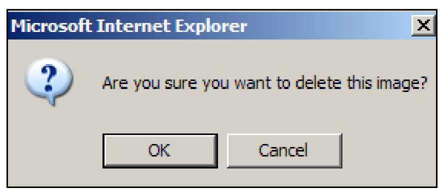
4.1.5.2.1.1 Delete Cost Curve

To Delete a Cost Curve (i.e. remove the file from the field):

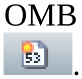
1. From the *I.H. Project (Investment) and Funding Plan* Section and *Project Summary (EVMS)* Sub-Section, click on the **Browse** button next to the field, "Provide a performance cost curve….."



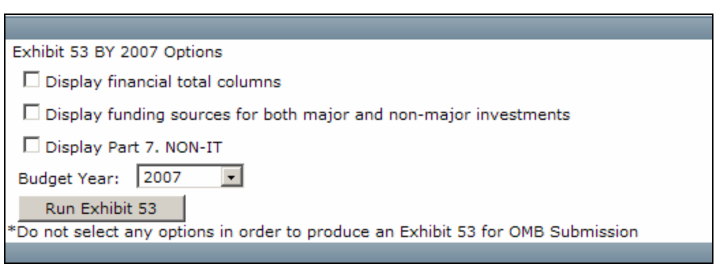
2. Confirm the deletion of the image. Select **OK**.



4.1.6 Exhibit 53 Varying BY option

For Release v3.1, one additional option has been added to the Exhibit 53 Report. Within the OMB Submissions module, users can generate the Exhibit 53 by clicking on the Exhibit 53 icon .

The Exhibit 53 Budget Year Options will appear:



1. Check the appropriate options

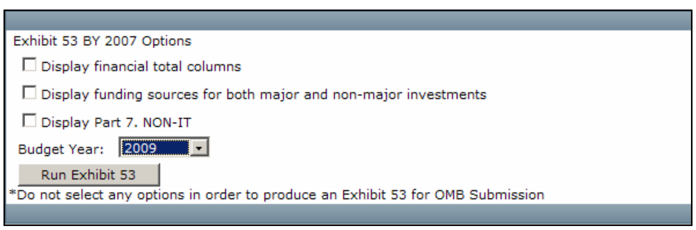
Note: If users do not modify any of the default options, the Exhibit 53 will be run based on the OMB version of the Exhibit 53 for the corresponding BY template

2. Click **Run Exhibit 53**. The Exhibit 53 will appear with all the information selected or in the format needed for OMB if no options are selected

Note: If a funding source is set as Intra-Governmental by the System Administrator, it will not be displayed on the Exhibit 53

The **Budget Year** option allows users to generate an Exhibit 53 using a variable/dynamic BY. Using a variable/dynamic BY will allow users to create variations of Exhibit 53 reports for future years as they wait for the new template to be provided. Once users select a year, the Exhibit 53 is built based on the year selected. By default, the Budget Year will be set to the BY that matches the template.

The following is an Exhibit 53 built with a Budget Year of 2009. The Exhibit 53 will now show the data as follows: BY=2009, CY=2008 and PY=2007. The data is pulled from the *Summary of Spending* table and the *Funding Source* table for columns 2009, 2008, and 2007 regardless of the labels. In order to see the outcomes of the variable/dynamic BY, data must be in the cells for the 2009, 2008, and 2007 columns.

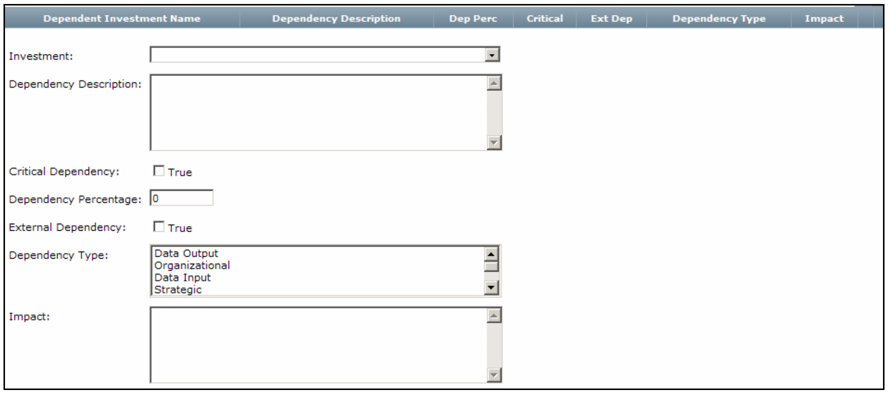


4.1.7 Investment Dependency Table

The **Investment Dependency** table has been created to capture relationships between investments. The table displays, for the investment that users are currently in, all investments that it is dependent upon. The table will show the Dependent Investment Name, Dependency Description, Dependence Percentage, Critical Dependency, External Dependency, and the Dependency Type, and Impact. This table shows how dependent an investment is on another investment that is in the eCPIC application.

Note: This table must be added into the Investment Workflow by the System Administrator. The System Administrator will place the table wherever the agency deems necessary.

When the **Investment Dependency** table is entered for the very first time by a user, and before data has been entered, only the table headers will be displayed



4.1.7.1 Add Dependent Investment

1. From within the investment for which users would like to add dependent investments, navigate to the section and sub-section that contains the Investment Dependency Table.

2. Click on the **Investment drop-down** box to select an investment. The investment selected will be the investment that will be listed as a dependency. All investments list are part of the eCPIC application.

3. Enter in a **Dependency Description**. List the agencies, laws, rules and regulations related to the dependency if this is an External Dependency.

4. For the Dependency Critical, **Check** or **Un-check** the box if the investment that users are in is critically dependent on the dependent investment. By default, the box is unchecked.

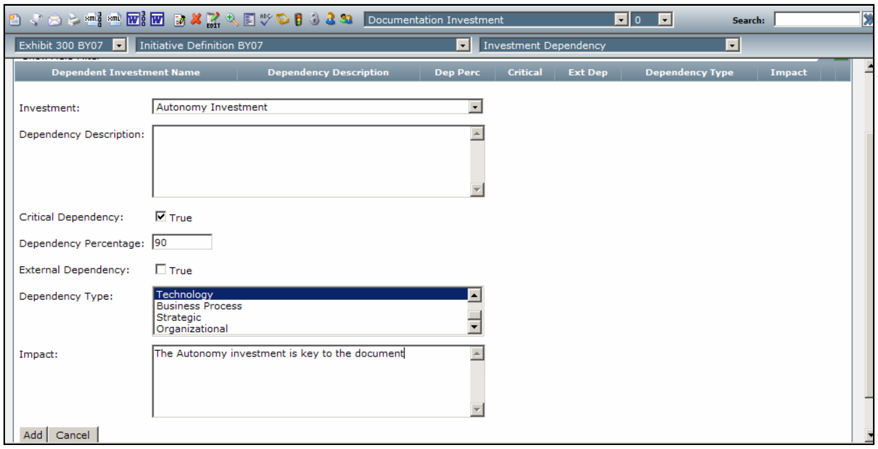
5. Enter in the **Dependency Percentage**. This will show in percentage how much the investment users are in depends on the Dependent Investment.

6. For the External Dependency, **Check** or **Un-check** the box if the investment is an External dependent. By default, the box is unchecked.

7. In the **Dependency Type** box, select the type of dependency the investment is.

8. In the Impact box, please explain the consequences of archiving the dependent investment and any data replacement strategies if the dependent investment was no longer available to this investment.

9. Once all information has been added, click the **Add** button.



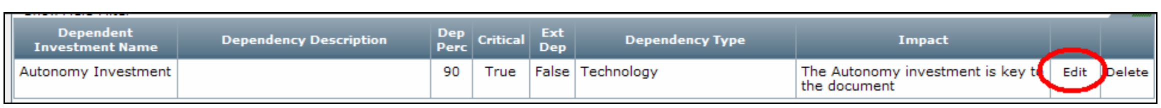
The Dependent Investment will be added to the Dependency Table. The above example shows that the *Documentation Investment* depends on the, or has a relationship with the *Autonomy Investment.*

Note: If the *Autonomy Investment* was revised and the name was changed, then the new investment name would automatically be populated in the Dependency Table.

4.1.7.2 Edit Dependent Investment

To Edit a Dependent Investment:

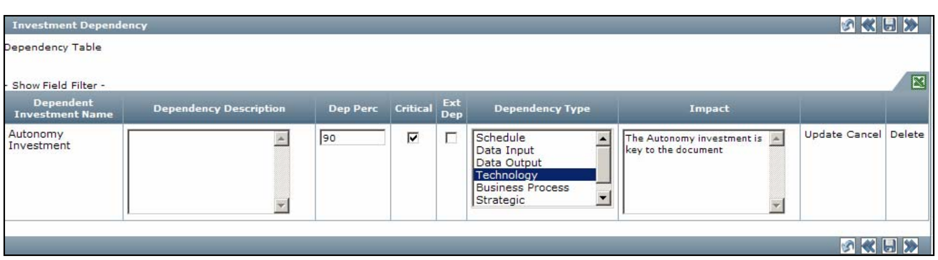
1. Click the **Edit** link for the specific dependent investment that will be edited. This will return the results of the selected row in the data entry form.



Dependent Investment Name	Dependency Description	Dep Perc	Critical	Ext Dep	Dependency Type	Impact		
Autonomy Investment		90	True	False	Technology	The Autonomy investment is key to the document	Edit	Delete

2. Update all information as necessary.

3. Click the **Update** button. If users do not want to undo any changes entered, click the **Cancel** button.

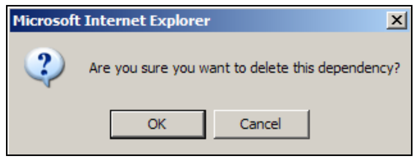


4.1.7.3 Delete a Dependent Investment

To Delete a Dependent Investment:

1. Click the **Delete** link for the specific dependent investment that will be deleted. This will return the results of the selected row in the data entry form.

2. Confirm deletion of the dependency. Click **OK**.



All data in the table can be exported to Excel by clicking on the icon.

Note: Reports can be run against the Dependency Table from within the Reports Module.

4.2 CHANGED FEATURES REQUIRING EXPLANATION

4.2.1 XML Import and Export

Significant changes involving the import and export of XML files from eCPIC are introduced with Release v3.1. Certain import and export procedures have been rewritten thereby realizing performance improvements. The following are new additions to eCPIC's import and export capability:

4.2.1.1 Import and Export of Funding Source table

Data existing within the Funding Source table can now be exported in the Full XML export and appears within the user defined field XML tags. This new functionality now allows for exported investments to maintain existing Funding Source data upon Import resulting in more user convenience. The Funding Source table is not required for OMB Submission and as a result, it does not appear during the XML 300 export. Funding Source table data can also be imported from XML files that are generated from the Full XML export functionality within eCPIC. Upon the import of Funding Sources, if the Funding Source Name or Type are not in the system, they will be created automatically and inserted into the database. For the Funding Source XML schema, please contact the eCPIC Help Desk.

4.2.1.2 Import and Export of Rich Text

Rich text can be exported to both Full XML as well as the XML 300. The OMB schema accepts rich text submissions within text area fields thereby allowing for improved functionality that simulates text editing in word processing applications. Rich text also appears for all Word exports resulting in a cleaner presentation of text data. Importing rich text fully populates all text areas with the formatted text.

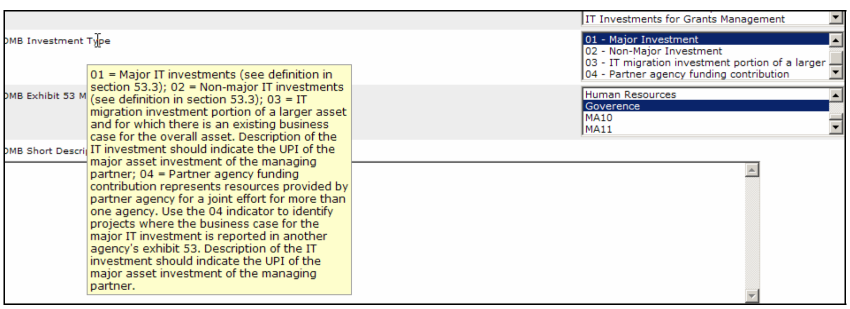
4.2.1.3 Import and Export of Cost Curve

The Performance Cost Curve image now exports to XML for both the Full XML and XML 300 exports. OMB recognizes this field and defines it within their schema with the "omb:performanceCurveGraph" XML tag. Users can also import the image from a given XML document. Other user defined images are not exported to XML due to performance considerations and cannot be imported via XML. As previously discussed, XML tags cannot be assigned to user-defined fields that have a field type of 'Image.'

4.2.2 Time for Rollover Help Text Display

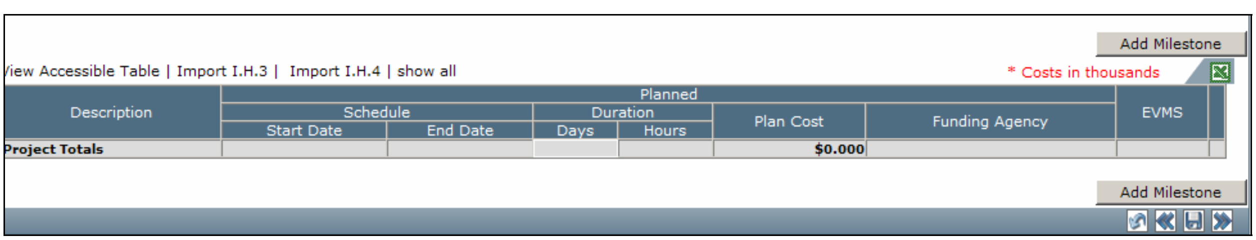
Several agencies requested extending the amount of time the bubble appears on the screen for rollover help before it disappears. For eCPIC v3.1, the rollover help was completely revamped to keep the rollover help displayed until the user moves the mouse cursor onto a different portion of the screen.

For OMB fields and Agency-defined fields that an Administrator has added help text to, there are help text boxes that will appear when mousing over the field name. These boxes will show a short description of the field or provide information to help define the type of answers needed. The field description box will stay on the screen until the user navigates away from the field name.

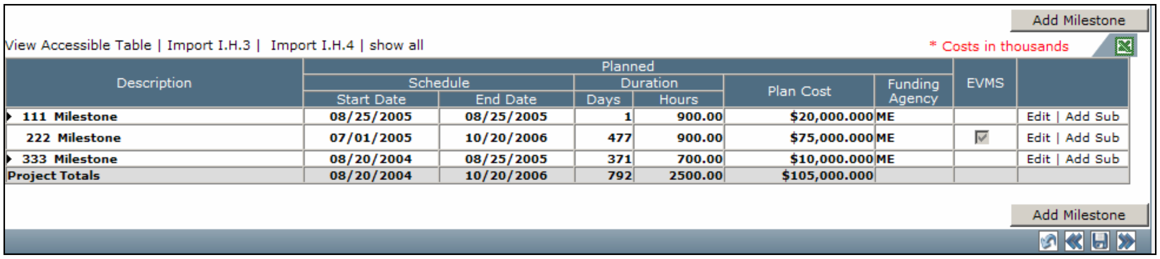


4.2.3 Expanding / Collapsing Milestones in I.H Tables

For Release v3.1, functionality for the expanding and collapsing of milestones has been added to the I.H tables. When a user accesses an I.H datagrid for the first time before data has been entered and assuming the data has not been imported into the Investment from a revision or MS Project file, only the table headings will be visible.



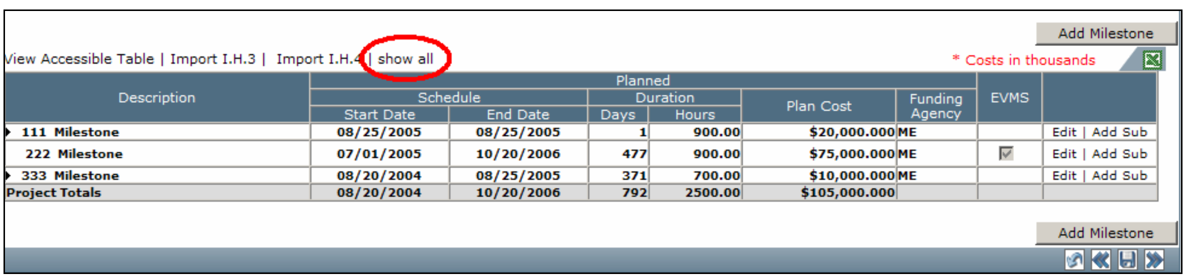
Once a milestone is added to the table, a user will then see a listing of all the milestones created when first accessing the table.



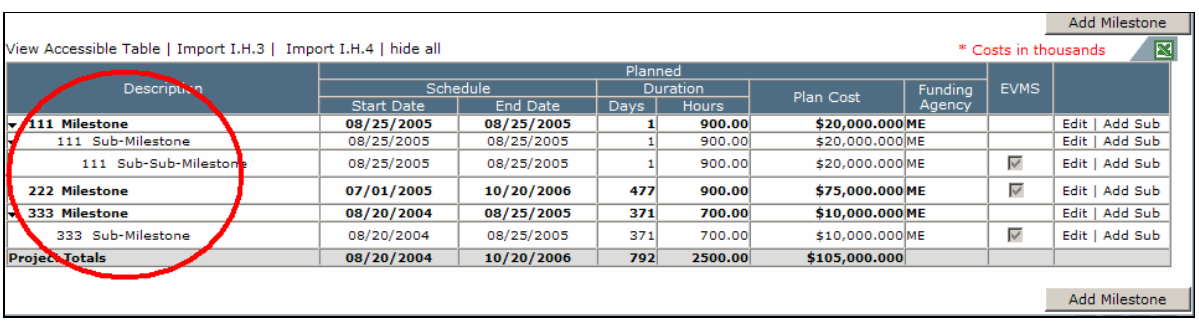
Description	Schedule: Start Date	Schedule: End Date	Planned Duration: Days	Planned Duration: Hours	Plan Cost	Funding Agency	EVMS	
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME		Edit | Add Sub
333 Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			

The I.H. table has functionality for expanding and collapsing the display of rows, regardless of whether any milestones have been tailored into the table. Any milestone with a triangle facing to the right is collapsed and can be extended by clicking on the icon to display any sub-milestones. Any milestone with a triangle facing down is expanded and can be collapsed by clicking on the icon to hide the sub-milestones.

For each milestone added, sub milestones may be added, as well as sub-sub milestones, and sub-sub-sub milestones and so on. In order to see all milestones within the I.H. table, users can select the **show all** link. This will show all the milestones that have been created.

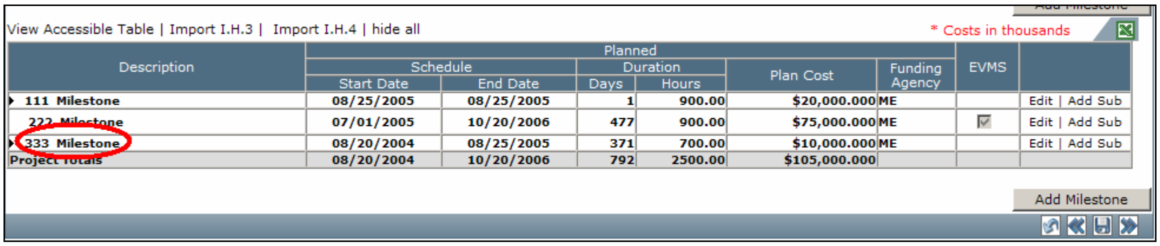


Description	Schedule: Start Date	Schedule: End Date	Planned Duration: Days	Planned Duration: Hours	Plan Cost	Funding Agency	EVMS	
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME		Edit | Add Sub
333 Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			



Description	Schedule: Start Date	Schedule: End Date	Planned Duration: Days	Planned Duration: Hours	Plan Cost	Funding Agency	EVMS	
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
111 Sub-Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
111 Sub-Sub-Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME		Edit | Add Sub
333 Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
333 Sub-Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			

If a user only wants to see certain milestones and sub-milestones, the I.H. table has the ability to extend rows. Let's say that a user only needs to see the sub-milestones for the 333 Sub Milestone:



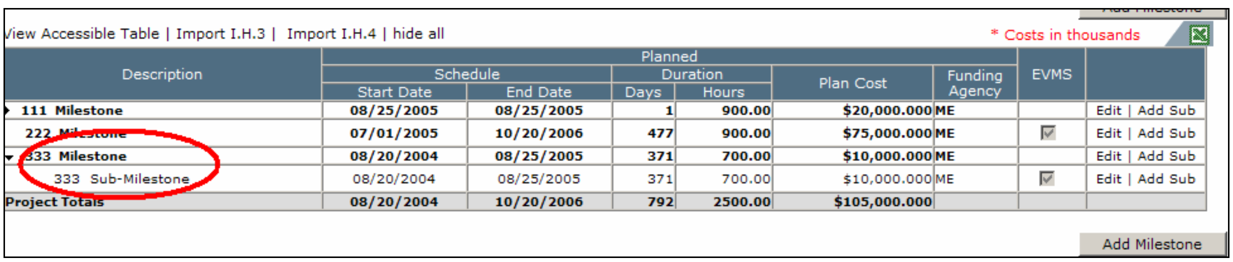
View Accessible Table | Import I.H.3 | Import I.H.4 | hide all

* Costs in thousands

Description	Planned							
	Schedule		Duration		Plan Cost	Funding Agency	EVMS	
	Start Date	End Date	Days	Hours				
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME	☑	Edit | Add Sub
333 Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			

Add Milestone

3. Click on the arrow next to the milestone name to be extended. This arrow means that this milestone has other sub-milestones associated with it. As long as the arrow is next to a milestone name, users will be able to click on the arrow to see all other associated milestones.



iew Accessible Table | Import I.H.3 | Import I.H.4 | hide all

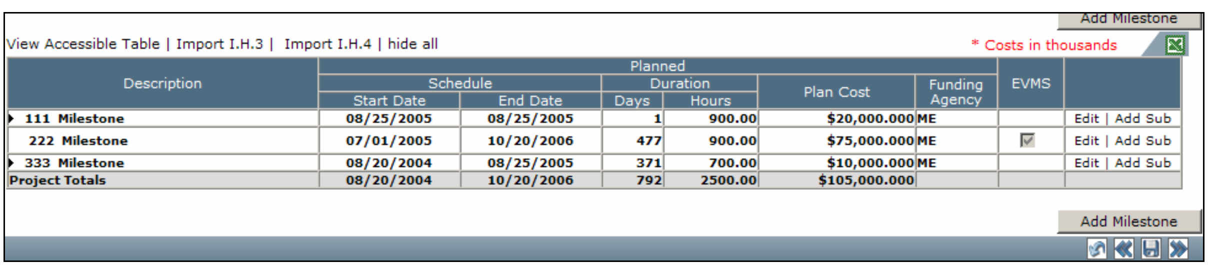
* Costs in thousands

Description	Planned							
	Schedule		Duration		Plan Cost	Funding Agency	EVMS	
	Start Date	End Date	Days	Hours				
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME	☑	Edit | Add Sub
333 Milestone	08/20/2004	10/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
333 Sub-Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME	☑	Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			

Add Milestone

4. Click on the arrow next to the milestone to collapse the row(s)

If users want to close the entire table, they can click on the **hide all** link. This will collapse the entire I.H. table and only the main or parent milestones will display.



Add Milestone

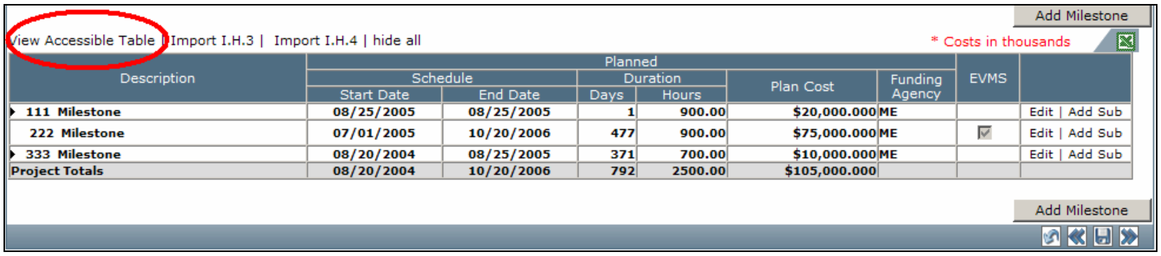
View Accessible Table | Import I.H.3 | Import I.H.4 | hide all

* Costs in thousands

Description	Planned							
	Schedule		Duration		Plan Cost	Funding Agency	EVMS	
	Start Date	End Date	Days	Hours				
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME	☑	Edit | Add Sub
333 Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			

Add Milestone

For 508 Compliance, the ability to expand rows can be prohibited by clicking on the **View Accessible Table** link at the top left of the I.H. table.



Add Milestone

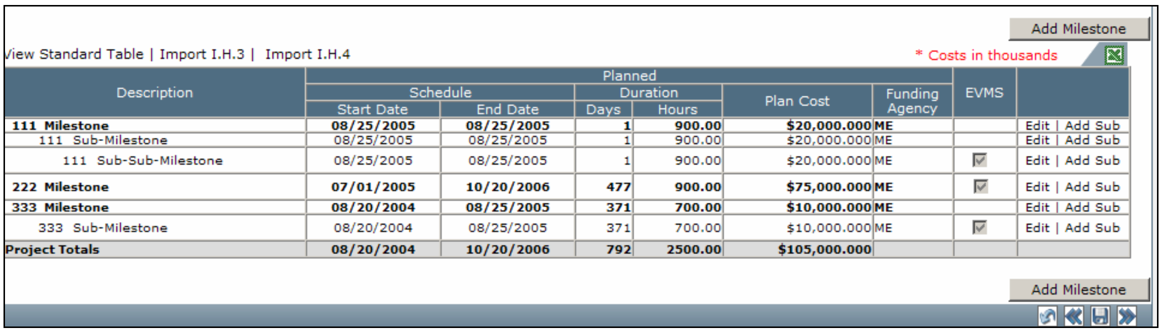
View Accessible Table | Import I.H.3 | Import I.H.4 | hide all

* Costs in thousands

Description	Schedule Start Date	Schedule End Date	Duration Days	Duration Hours	Plan Cost	Funding Agency	EVMS	
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME	☑	Edit | Add Sub
333 Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			

Add Milestone

Clicking this link displays all the milestones with no expanding and collapsing triangles.



Add Milestone

View Standard Table | Import I.H.3 | Import I.H.4

* Costs in thousands

Description	Schedule Start Date	Schedule End Date	Duration Days	Duration Hours	Plan Cost	Funding Agency	EVMS	
111 Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
111 Sub-Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME		Edit | Add Sub
111 Sub-Sub-Milestone	08/25/2005	08/25/2005	1	900.00	$20,000.000	ME	☑	Edit | Add Sub
222 Milestone	07/01/2005	10/20/2006	477	900.00	$75,000.000	ME	☑	Edit | Add Sub
333 Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME		Edit | Add Sub
333 Sub-Milestone	08/20/2004	08/25/2005	371	700.00	$10,000.000	ME	☑	Edit | Add Sub
Project Totals	08/20/2004	10/20/2006	792	2500.00	$105,000.000			

Add Milestone

To return to the I.H table that has expanding and collapsing functionality, click on the **View Standard Table** link.

4.2.4 Portfolio Charting

For Release v3.1 a couple of minor adjustments have been made to the SOS Pie Charts, including adjusting the pie slice threshold, providing for chart rotation, and adding a charting documentation pop-up window within the application.

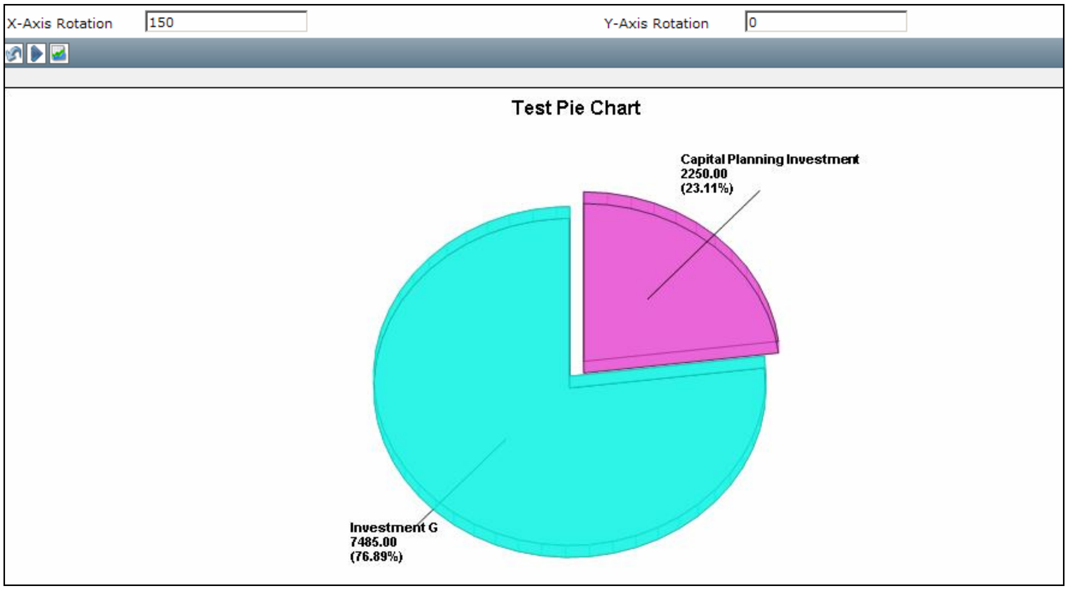
4.2.4.1 Percent Threshold

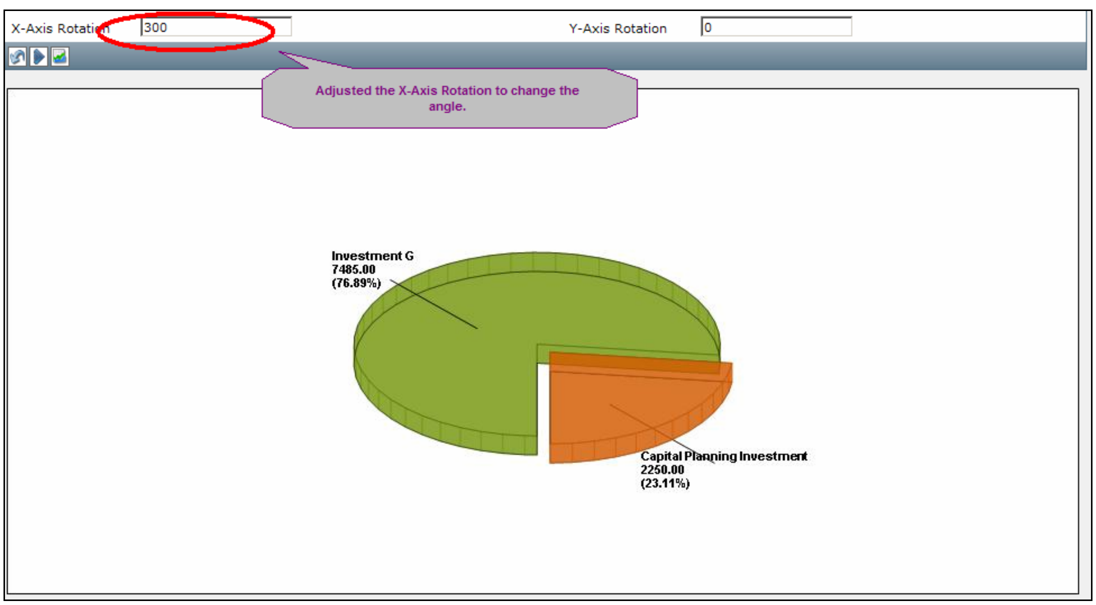
For the Summary of Spending Pie Chart, the percent threshold has been set to 0% in order to display all pie slices regardless of contribution to total percentage. As a result, fields that have no contribution to the total will display as nominal values on the generated pie chart and slices will no longer be combined into an 'Other' label.

4.2.4.2 Chart Rotation

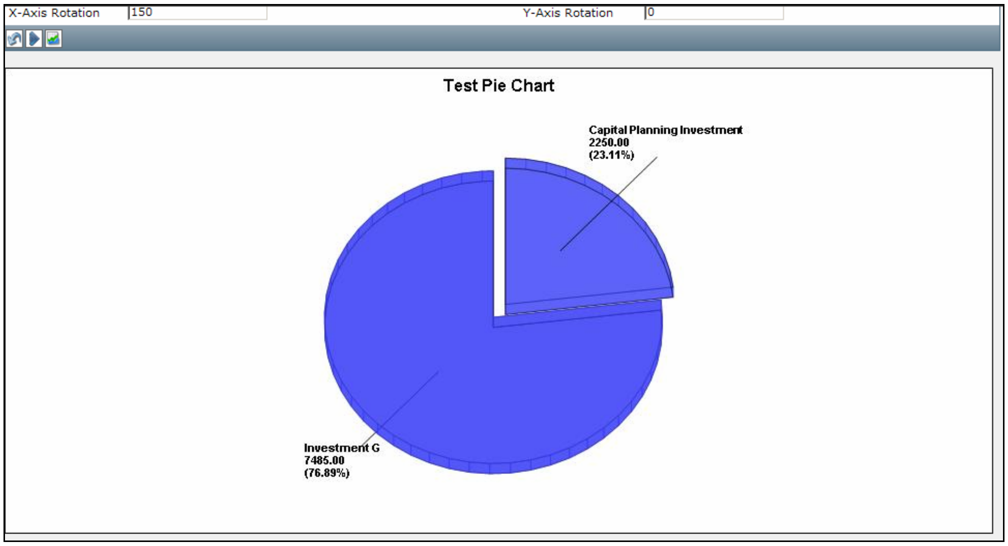
To allow for the adjustment of the labels in the 3-D SOS Pie Chart, three dimensional rotations can now be specified by the user. This addition was made to ensure that the angle of the pie can be adjusted to better display the pie slice labels that previously were hidden by the pie itself.

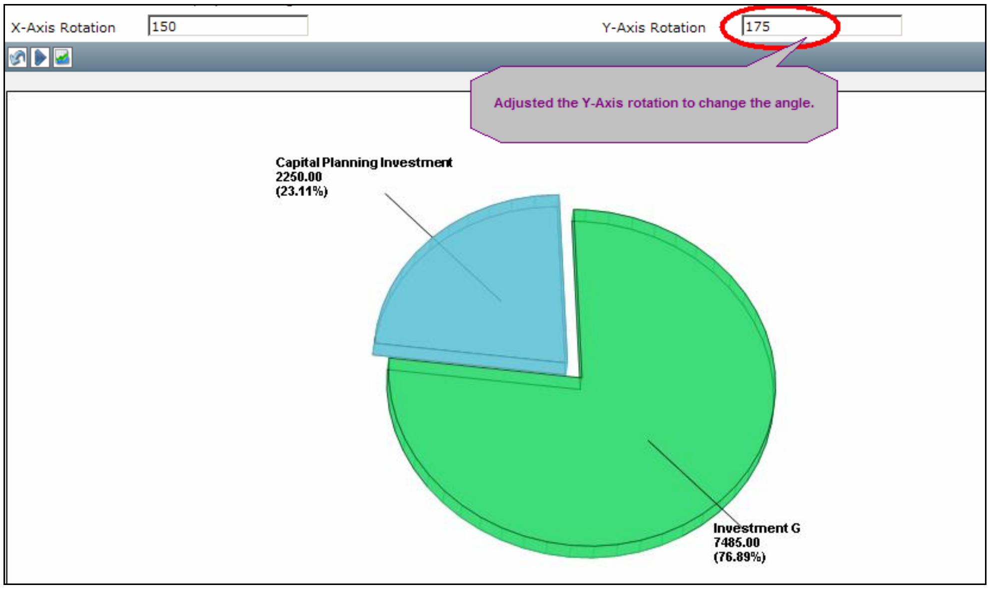
X-Axis Rotation: Will rotate the Pie image on the X-Axis angle. By default it is set to a rotation of 150 degrees.





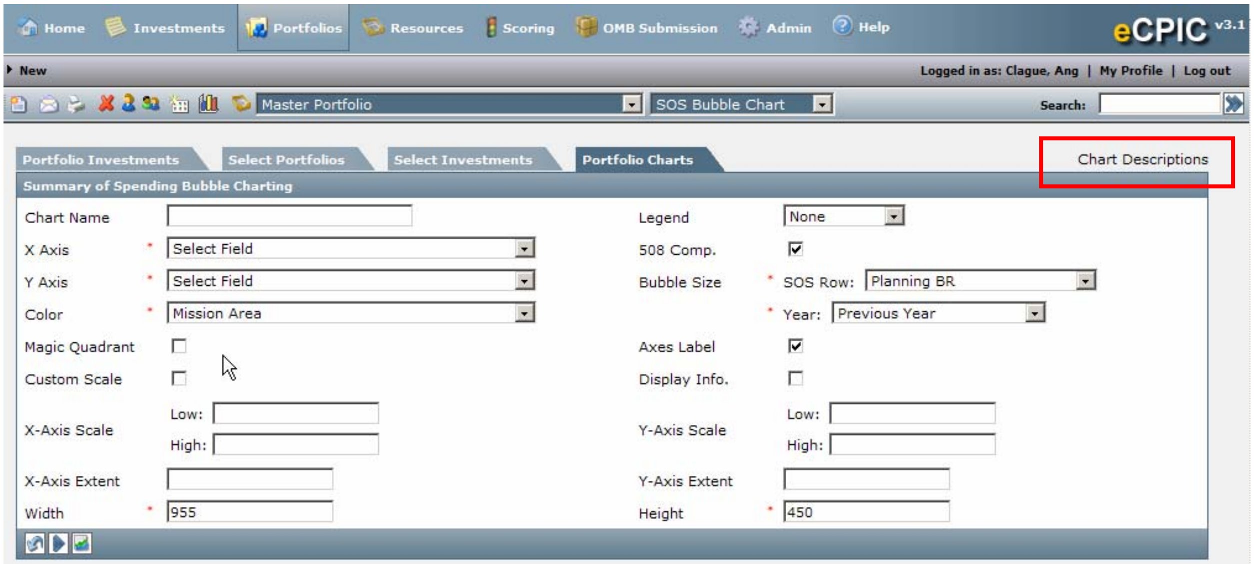
Y-Axis Rotation: Will rotate the Pie image on the Y-Axis angle. By default it is set to a rotation of 0 degrees.



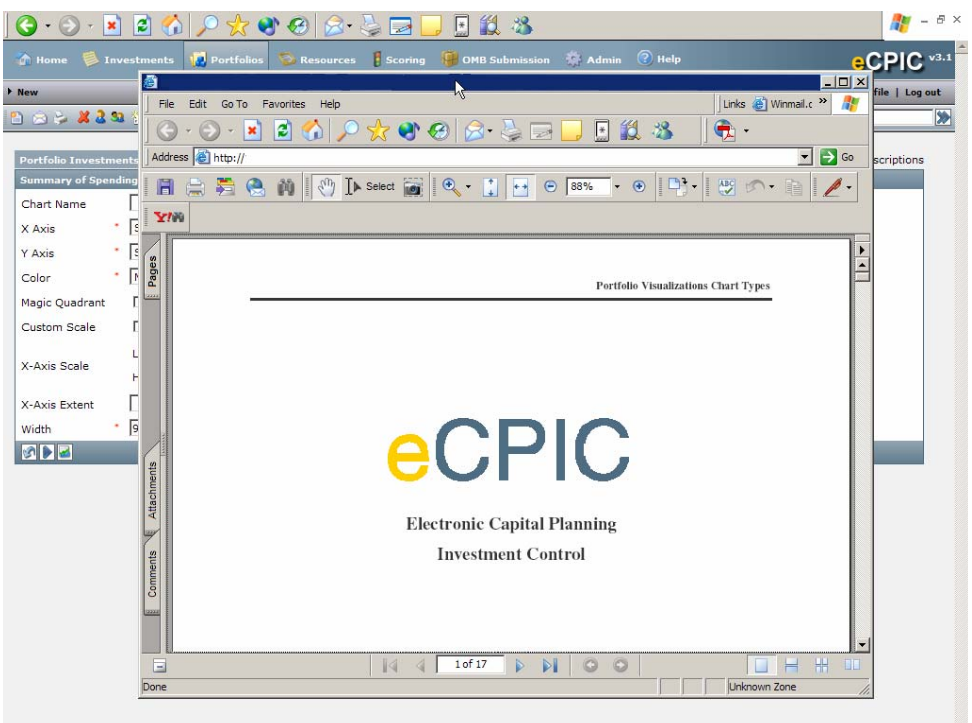


4.2.4.3 Charting Documentation Link

If users need a description of a Chart, click on the **Chart Description** link.



This will pop-up the *Portfolio Visualizations Chart Types* document that is also posted on the eCPIC Resource Center (ERC.) The document gives users a brief description of each chart type.



4.2.5 User Interface Modifications

For eCPIC Release v3.1, numerous UI change requests were addressed. These include:

1. Adjusting cost label to red font and consistent positioning on datagrids
2. Moving the filter to top of datagrids in Investment Module
3. Placing Excel export icon in a tab on the upper right of all datagrids
4. Changing the Exhibit 53 icon
5. Allowing users to sort scoresheets by the overall status in the scoresheet tab of the scoring module
6. Renaming the "Manage Life Cycle Cost" selection in the Admin Module → Investment drop-down to "Manage Summary of Spending"

4.2.6 508 Compliance

508 Compliance has been a major area of attention for Release v3.1. Issues identified in previous 508 test cycles as well as new functionality introduced within eCPIC have been tested for compliance. Together, with the Department of Education, the eCPIC SLA Support team has taken steps to ensure that this major release passes 508 Compliance testing. For the UAT period, the Department of Education and eCPIC SLA Support team will again work hand-in-hand to test eCPIC and address issues with 508 Compliance that are identified prior to release of the final package to the eCPIC User Community.

5. CHANGE REQUESTS ADDRESSED

The list of Change Requests addressed in this release is provided as Appendix A in a separate Excel spreadsheet.

6. DEFERRED CHANGE REQUESTS

Deferred CRs represent known issues, suggestions for enhancement, or new requirements that the eCPIC SLA membership has either not yet reviewed or has determined not to take immediate action on. A new list of change requests that contains a separate sheet for deferred CRs is posted to the online eCPIC Resource Center (ERC) located at http://www.ecpic.gov every Wednesday.